Callback	appears as the default. The user can either choose to look at these callbacks or navigate to a different callback method and type.

2.1.3 Callback Summary

The system also displays a main callback summary that contains information corresponding to the previously selected callback method and types.

2.1.4 Shop Callback

The user selects the Manual/Automated/Fax/Consolidated Shop callback option. The system displays a list of shop accounts assigned to contracts having incomplete callbacks. For each shop, the following information will be displayed:

- Shop account name
- Telephone number
- Number of calls
- Number of left messages
- Customer number
- Customer address

The user has the option to print this list see alternate flow Print List.

If the user chooses to select the Manual/Automated/Fax/Consolidate Bill-To see alternate flow bill-to callback. If the user chooses to select the Renter callback option, see alternate flow renter callback.

2.1.5 Selecting A Shop Customer

The user selects a shop customer from the list. Only one shop customer may be selected at a time. The system displays a list of contacts associated with the selected shop customer in the main callback summary and the following information is displayed:

- Contact Name
- Contact Phone Number
- Number of Calls
- Number of Left Messages

If the user chooses the ALLoption see alternate flow ALL Contacts option.

2.1.6 List of contracts displayed

The system displays a list of contracts associated with the selected shop customer in the main callback summary. For each contact, the following information will be displayed:

- Number of days callback has been outstanding
- Renter name
- Description of renter's vehicle
- Claim number, policy number, RO number, PO number
- Date of loss
- Primary callback reason
- Today's action of callback

- Contract number

The user will either have the authority to view only or actually perform a callback at this point (TBD).

2.1.7 The use selects to exit the callback summary and the use case ends.

2.2 Alternative Workflows

2.2.1 Bill-To callback

The user selects the Manual/Automated/Fax/Consolidated Bill-To callback option. The system displays a list of bill-to customers assigned to contracts having incomplete callbacks .

2.2.2 Selecting a bill-to

The user selects a bill-to customer from the list. Only one bill-to may be selected at a time. The system displays a list of contacts associated with the selected shop customer in the main callback summary and the following information is displayed:

- Contact Name
- Contact Phone Number
- Number of Calls
- Number of Left Messages

The user has the option to print this list see alternate flow Print List.

If the user chooses the ALL option see alternate flow ALL Contacts option.

2.2.3 List of contracts displayed

The system displays a list of contracts associated with the selected bill-to customer in the main callback summary. For each contract, the following information will be displayed:

- Number of days callback has been outstanding
- Renter name
- Description of Renter's Vehicle
- Primary callback reason
- Claim number, policy number, PO number, RO number
- Date of Loss
- Today's action on callback
- Contract Number

The user will either have the authority to view only or actually perform a callback at this point (TBD).

2.2.4 Renter callback

The user selects the Renter callback option .

2.2.5 List of contracts displayed

The system displays a list of the renters assigned to contracts that have incomplete callbacks. For each contract, the following information is displayed:

- Number of days the callback has been outstanding
- Renter name
- Current amount due (balance due as of estimated return date)
- Payment type
- Renter's home phone number
- Primary callback reason
- Contract Number
- Today's action on last callback

The user has the option to print this list, see alternate flow Print List.
The user will either have the authority to view only or actually perform a callback at this point (TBD).

2.2.6 View different branch

The user chooses to view callbacks for another branch within the group .

2.2.7 View Different Group

The user chooses to view callbacks for a different group .

2.2.8 No Callbacks Retrieved

The system does not retrieve any callbacks for a given group branch. The user can choose to view callbacks at another group branch or chooses to exit the summary and the use case ends.

2.2.9 ALL Contacts Option

The user selects ALL in regards to the contacts for the selected customer. The following information will display:

- The contact name will be ALL
- The contact phone number will be the same as the customer's
- The number of calls and messages will be the sum of the values for all the customer's other contacts

2.2.10 Print List

- The user has the option to print the list they are viewing .
- The user chooses to print and the use case continues at basic flow .

2.2.11 UNKNOWN contact

The user selects UNKNOWN in regards to the contacts for the selected customer. The following information will display:

- The contact phone number will be the same as the customer's

2.2.12 Perform callback

If the user selects to perform a callback, see Shop/Bill-To/Renter perform callback use case according to the current selection of the callback type .

2.2.13 Search for a callback

If the user selects to search for a callback, see Shop/Bill-To/Renter search callback use case according to the current selection of the callback type.

2.2.14 The user chooses to exit the callback summary and the use case ends.

3. Special Requirements

3.1 Alphabetically sorted

The customer list should be sorted alphabetically.
Contact list is sort by last name and then first name, with the following exceptions:

- The ALL selection should appear first in the list
- The UNKNOWN contact, if present, should appear after the ALL

3.2 Title Bar

The title bar displays the callback method and the callback type selected on the navigation bar. When the callback summary initially comes up, the default setting is "manual callbacks – shop".

3.3 Callback Center

When the requesting terminal is from a Callback Center, those callbacks that are consolidated to the particular Center should be grouped to the appropriate callback type under the "manual" callback method.

3.4 Consolidated Callbacks

Additional data field is shown for the Group and Branch to which the callback is consolidated.

4. Pre-Conditions

4.1 The user has logged in and has callback summary view privilege.

5. Extension Points

5.1 <name of extension point>

6. FAQ's

7. To Be Determined

Enterprise Rent-a-Car®

Rental Redesign/ECARS 2.0

Business Use-Case Specification: Generate Callback List

Version 3.2

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Revision History

Date	Version	Description	Author
05/10/2000	1.0	Initial creation of form.	David Beebe
05/18/2000	1.1	1st Revision-Initial Use Case entered	Johnny S. Johnston
06/09/2000	1.2	2nd Revision-Initial Use Case updates	Johnny S. Johnston
06/23/2000	1.3	3rd Revision-Copied Initial Use Case into Rational's Use Case format.	Stephanie Schiwinger
07/14/2000	2.0	4th Revision-Update for first user review feedback.	Johnny S. Johnston
08/29/2000	2.1	5th Revision-Update for resolution of action items.	Johnny S. Johnston
09/06/2000	2.2	6th Revision-Update based on Jeff Roderick's review	Allison Bruhn
09/14/2000	2.3	7th Revision-Update for final business design meeting	Johnny S. Johnston
10/3/2000	2.4	8th Revision-Added appendix detailing out the generation logic examples and clarified logic on the day a callback should be generated.	Mike Pallia
03/13/01	3.0	9th Revision-Changed the use case to match the standard format. Removed some steps which is irrelevant to this use case.	Santhosh Kumar
04/18/2001	3.1	10th Revision-Formatting changes to be consistent with other use cases.	Allison Bruhn
05/02/2001	3.2	11th Revision-Added alternate flow addressing the Shop being the Bill-To; Changed wording and structure in main flow (put more detail in 2.1.1); reformatted alternate flows and special requirements to read a little easier by taking out italics and extra quotation marks;	Allison Bruhn
5/25/2001	4.0	12th Revision-Change generation criteria from using batch to event trigger	Pin Koh
8/14/2001	4.1	13th Revision- Changed wording on 2.1.2 and 2.2.3 per meeting w/Jon and Mary	Leah Moellman
10/04/2001	4.2	14th Revision- Remarked Special Req. Also updated RMS Callback Flow to current requirements.	Leah Moellman

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Use Case Specification: Generate Callback List

1. Generate Callback List

1.1 Brief Description

This use case will show what the system does to generate callbacks that result from newly created or updated contract information into the Rental GUI.

2. Flow of Events

2.1 Basic Workflow

2.1.1 Use Case Begins

This use case begins when the system generates callbacks based on reasons when rental records are **created** or **changed**. The types of callbacks that may be generated include Shop, Bill-To, and Renter. Since in the callback summary use case, the main flow is Shop callback, this use case will stay consistent with that. If the system generates a Bill-To callback see alternate flow Generate Bill-To. If the system generates a Renter callback see alternate flow Generate Renter. If the Shop is also the only Bill-To on the contract, see alternate flow Shop Is The Bill-To. If the contract status is "void" see alternate flow Contract Status is Void.

2.1.2 Generate Shop Callbacks

A shop callback is generated with the reason to "Obtain Repair Status" if the following conditions below exists:

- Estimated completion date is not null and the contract status is open.
  OR
- Bill-to extension date is not empty and the contract status is open.

Callback date is the earlier of estimated completion date and bill-to extension date

2.1.3 The use case ends.

2.2 Alternative Workflows

2.2.1 Generate Bill-To Callbacks

A bill-to callback can be generated based on two reasons. The reasons are obtain initial authorization and obtain authorization extension. If the conditions within each reason exist, a bill-to callback will be generated:

2.2.1.1 Reason One-Obtain Initial Authorization

- The bill-to authorization is pending or null and the contract status is reservation, open, or close-pended.
  OR
- The bill-to extension date is null or blank and the contract status is reservation, open, or close-pended

Callback date is the date when bill-to is created or changed.

2.2.1.2 Reason Two-Obtain Authorization Extension

- Bill-To authorization status is Authorized, Bill-To extension date is not null
  AND
- The contract status is open or close-pended.

Callback date is the extension date.

2.2.2 Generate Renter Callbacks

A renter callback can be generated based on five reasons. The reasons are last day notification, balance due, past estimated return date, ticket re-write, or maximum authorized amount reached. If the conditions within any of the reasons exist, a renter callback will be generated:

2.2.2.1 Reason One-Last Day Notification

- If a value has been entered into the Bill-To last day date and the contract status is open
  AND
- Renter has not been contacted about this last day date.

Callback date is last day date

2.2.2.2 Reason Two-Balance Due

- If the renter balance due amount is greater than any/all deposits plus credit card authorizations
  AND
- the contract status is open or close-pended.

Callback date is 1 day before the date when renter has a balance due.

2.2.2.3 Reason Three-Past Estimated Return Date

- If contract status is open.

Callback date is estimated return date.

2.2.2.4 Reason Four-Ticket Rewrite

- (If the estimated return date minus the contract open date is between 27 and 30 days
  AND
- The renter has not been notified for rewrite
  AND
- the contract status is open.)
- **OR**
- (If the estimated return date minus the contract open date is greater than or equal to 31 days

- AND
- The contract status is open.)

Callback date is estimated return date.

2.2.2.5 Reason Five-Maximum Authorized Amount Reached

- If the estimated charges for the Bill-To portion has reached the maximum amount that the Bill-to authorized
  AND
- The contract status is open.

Callback date is date when estimated charges exceeds bill-to authorized amount.

2.2.3 Shop Is The Bill-To

If the shop is also the only bill-to on a contract, a shop callback and bill-to callback is generated.

2.2.4 Contract Status is Void

The system deletes all callback records for this reservation and the use case ends.

3. Special Requirements

3.1 Balance Due Threshold

The value in this field will be used to determine the maximum dollar amount a renter can owe before triggering a callback. Each group branch will be able to set the value placed into this field for the balance due callback reason only. Initially this value will be set to $1 for the balance due callback reason for all branches

3.2 .Monday Slide Threshold

This threshold acts as a weekend slide but will be set up for every day of the week. The value in the threshold indicates the number of days later (a positive number) or earlier (a negative number) the callback should be generated. Each branch will be able to set this value for all the callback reasons. Initially this value will be set to:

- -3 days=for balance due and maximum authorized amount callback reasons
- 0 days=for all other callback reasons

3.3 Tuesday Slide through Saturday Slide Thresholds

These will all behave the same way as the Monday Slide. Each branch will be able to set this value for all callback reasons. Initially this value will be set to 0 days.

3.4 Sunday Slide Threshold

Same as the Monday Slide. Each branch will be able to set this value for all callback reasons. Initially this value will be set to:

- -2 days=for balance due and maximum authorized amount callback reasons

- 0 days=for all other callback reasons

3.5 Holiday Slide Threshold

- If a callback would be generated on holiday, then the system will look to the value in this threshold to determine how many days earlier (a negative number) or later (a positive number) the callback should be generated:
- -1=for all callback reasons

3.6 When to Generate Threshold

- This field will tell the system how many days before a generation criteria is true to generate the callback. Each branch will be able to set this value for each callback reason. Initially this value will be set to:
- 1 day=For balance due and maximum authorized amount callback reasons
- 0 days=for all other callback reasons

3.7 Contract Status Threshold

- This field indicates the valid statuses of rental contract for a callback reason. Each branch will be able to set this value for each callback reason. Initially this value will be set to:
- Reservation, Open, Close-Pend=for initial authorization
- Open and Close-Pend=for authorization extension and balance due callback reason
- Open=for all other callback reasons

3.8 Rewrite Max Days Threshold

This field will tell the system the maximum number of days a contract can be opened before a rewrite is necessary. Each branch will be able to set this value for a callback reason of ticket rewrite only. Initially this value will be set to 30 days for the ticket rewrite callback reason for all branches.

3.9 Rewrite Minimum Days Threshold

This field will tell the system the number of days before the maximum is reached that a callback reason of ticket rewrite should be generated. Each branch will be able to set this value for a callback reason of ticket rewrite only. Initially this value will be set to 3 days for the ticket rewrite callback reason for all branches

3.10 ARMS Callback

The system reads the ARMS legacy database ARMSPR1, using the ARMS customer profile ID associated as Bill-To/Shop . The Bill-to profile ID always overrides Shop profile ID. The system checks the field value for 'P1YN21' is populated as 'Y'. If it is 'Y', generate the Shop and Bill-To callbacks one day before the branch generation criteria would generate it.

3.11 RMS Callback

A RMS callback is generated based on the **Callback Date** .

- The initial **Callback Date** is determined by the Bill To Account Number and branch number, which is stored in the Days to Call file.

- The second **Callback Date** is driven manually by the user for all additional calls that are made to the body shop.

The system checks in the legacy database CB032P for the **callback date.** If the **callback date** is not found, the system checks the CB030P file for Days to call, for the Bill-To Account Number.

3.12 Callback Methods

By default all callbacks are assigned with Manual method. Below is the rule that is applicable for Shop and Bill-To callbacks:

- Manual (default method)
- Electronic
- Fax
- Consolidated

4. Pre-Conditions

4.1.1 First Pre-Condition

5. Extension Points

5.1 First extension point

6. FAQ's

Rental Redesign/ECARS 2.0
Use Case Specification: RMS Callback Summary
Version <1.0>
Draft

Revision History

Date	Version	Description	Author
<dd/mmm/yy>	<x.x>	<details>	<name>
9/28/01	1.0	Initial Draft	Leah Moellman
10/3/01	1.1	Updates from internal review	Leah Moellman
10/10/01	1.2	Updates from user review	Leah Moellman
10/11/01	1.3	Entered into ReqPro an marked requirements	Leah Moellman

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Use Case Specification: RMS Callback Summary

1. RMS Callback Summary

1.1 Brief Description

This use case will describe how a user interacts with a system to view a branch or group's list of RMS callbacks needing to be performed for a given day.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when the user chooses to view RMS callbacks, from the summary screen, needing to be performed for a given day.

2.1.2 The system retrieves all incomplete RMS callbacks for the default group and branch (the default is the group and branch where the user logged in) . Note: A user may also view callbacks from various groups and branches depending on authority.

2.1.3 The user has the option to view RMS callbacks by:

- Direct Bill (Y) Tickets only (Body shop calls only)
- Direct Bill (Y) Tickets only (ARMS Auto Body Shop Calls only)
- Direct Bill (N) Tickets only (Authorizations needed)
- Direct Bill (N) Reservation only (Authorizations needed)

2.1.4 For the basic flow, the user selects to view **Direct Bill (Y) Tickets only (Body shop calls only).**

2.1.5 The user selects which RMS account they wish to view .

2.1.6 The system displays a list of shop accounts assigned to contracts or reservations that have incomplete RMS callbacks . For each shop, the following information will be displayed:

- Shop account name
- Telephone number
- Number of calls
- Number of left messages
- Account Number
- Account Address

2.1.7 The user selects a shop account from the list.

2.1.8 The system displays a list of contacts associated with the selected shop account:

- Contact Name
- Contact Phone Number
- Number of calls
- Number of left messages
- Update message status

2.1.9 The user selects a contact and the system displays a list of contracts associated with the selected account number in the main callback summary . For each contract, the following information will be displayed:

- Number of days callback has been outstanding
- Renter Name
- Description of renter's vehicle
- Claim Number, Policy Number, RO Number, PO Number
- Date of loss
- Contract status
- Primary callback reason
- Today's action of callback
- Contract Number

2.1.10 The user selects from the list of contracts and the use case ends .

2.2 Alternative Flows

2.3 Direct Bill (Y) Tickets only (ARMS Auto body shop calls)

2.3.1 The user selects to view Direct Bill (Y) Tickets only (ARMS Auto body shop calls).

2.3.2 The user selects which RMS account they wish to view .

2.3.3 The system displays a list of shop accounts assigned to contracts or reservations that have incomplete RMS callbacks . For each account, the following information will be displayed:

- Shop account name
- Telephone number
- Number of calls
- Number of left messages
- Account Number
- Account Address

2.3.4 The user selects a Shop account from the list.

2.3.5 The system displays a list of contacts associated with the selected Shop account:

- Contact Name
- Contact Phone Number
- Number of calls
- Number of left messages
- Update Message Status

2.3.6 The user selects a contact and the system displays a list of contracts associated with the selected account number in the main callback summary . For each contract, the following information will be displayed:

- Number of days callback has been outstanding
- Renter Name
- Description of renter's vehicle
- Claim Number, Policy Number, RO Number, PO Number
- Date of loss
- Contract status

- Primary callback reason
- Today's action of callback
- Contract Number

2.3.7 The user selects from the list of contracts and the use case ends .

2.4 Direct Bill (N) Tickets only (Authorization Needed)

2.4.1 The user selects to view Direct Bill (N) Tickets only (Authorizations needed).

2.4.2 The system displays a list of Bill To accounts assigned to contracts or reservations that have incomplete RMS callbacks . For each account, the following information will be displayed:

- Bill To account name
- Telephone number
- Number of calls
- Number of left messages
- Account Number
- Account Address

2.4.3 The user selects a Bill To account from the list.

2.4.4 The system displays a list of contacts associated with the selected Bill To account :

- Contact Name
- Contact Phone Number
- Number of calls
- Number of left messages
- Update Message status

2.4.5 The user selects a contact and the system displays a list of contracts associated with the selected account number in the main callback summary . For each contract, the following information will be displayed:

- Number of days callback has been outstanding
- Renter Name
- Description of renter's vehicle
- Claim Number, Policy Number, RO Number, PO Number
- Date of loss
- Contract status
- Primary callback reason
- Today's action of callback
- Contract Number

2.4.6 The user selects from the list of contracts and the use case ends.

2.5 Direct Bill (N) Reservation Only (Authorization Needed)

2.5.1 The user selects to view Direct Bill (N) Reservation Only (Authorization Needed).

2.5.2 The system displays a list of Bill To accounts assigned to contracts or reservations that have incomplete RMS callbacks . For each account, the following information will be displayed:

- Bill To account name

- Telephone number
- Number of calls
- Number of left messages
- Account Number
- Account Address

2.5.3 The user selects a Bill To account from the list.

2.5.4 The system displays a list of contacts associated with the selected Bill To account:

- Contact Name
- Contact Phone Number
- Number of calls
- Number of left messages
- Update Message Status

2.5.5 The user selects a contact and the system displays a list of contracts associated with the selected account number in the main callback summary . For each contract, the following information will be displayed:

- Number of days callback has been outstanding
- Renter Name
- Description of renter's vehicle
- Claim Number, Policy Number, RO Number, PO Number
- Date of loss
- Contract status
- Primary callback reason
- Today's action of callback
- Contract Number

2.5.6 The user selects from the list of contracts and the use case ends .

3. Special Requirements

General Rule Sets

1. An unauthorized user will have limited access to RMS callbacks.
2. RMS callbacks are sorted by account by body shop.
3. Reservations should not display after 30 days .
4. A bill to Account Number and GPBR Number identifies RMS callbacks .
5. Closed contracts should not display .
6. Must have the ability to sort calls by bill to "Y" and "N" for both reservations and open tickets.
7. Must display whether the contract is ARMS and authorized (direct bill "Y" or "N").
8. Within the customer profile, RMS calls must be consolidated by group(s) to a particular branch. The consolidated groups and branch must be easily identified and displayed.
9. An open ticket or reservation must have a bill-to account number (entered in the customer profile) with adjustor callbacks selected, for it to be considered a RMS callback.

4. International Requirements

-

5. Pre-Conditions

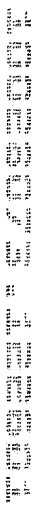
- A user has successfully logged onto the computer.
- User is an authorized RMS user.
- Callback is an RMS Callback.

6. Post-Conditions

7. Extension Points

8. Questions

1. Does **callback date** need to be on summary or just perform?
2. Does there need to be the ability to just select by Direct Bill (Y) etc. or do they need to be sorted by this criteria?
3. Does the RMS user do the renter calls or is this the branch responsibility?
4.



Callback
Automatic Callback Generation Scenarios

Version 1.0

Revision History

Date	Version	Description	Author
8/15/2001	1.0	Creation	Leanne Bevelhimer

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1. Introduction

This document details the scenarios in which a callback gets automatically generated. It is supplemental information to the Generate Callback Use Case.

General Information

- Within this document the callback date is defined as the date to perform the callback and is determined differently by each rule.
- Callbacks will never be generated for a past date. The minimum date that a callback can occur is the current date.

1.1 Purpose

The purpose of this document is foster the communication between the business users and the Callbacks team. It is to be used to put specific examples to items in the use case to enhance the clarity of the business rules.

1.2 Scope

This document supports the Generate Callback Use Case.

1.3 References

Generate Callback Use Case

1.4 Overview

The main content of this document documents in detail the business rule that governs the life cycle of all callbacks. It describes the conditions, actions and results that affect callbacks.

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2. Shop Callbacks

2.1 Obtain Repair Status

2.1.1 Rental Contract Status

The rental contract status must be:

- Open

2.1.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user enters a new Shop for a new or existing rental. The Estimated Completion date is optional.	No Obtain Repair Status callback exists for this new shop	Create an Obtain Repair Status callback, based on the Estimated Completion Date or Bill-To Extension date, with incomplete status
The user retrieves a rental contract. The user then changes the Estimated Completion Date or Bill-To Extension Date to a valid date.	An incomplete Obtain Repair Status callback exists.	Complete the existing Obtain Repair Status callback And Create an Obtain Repair Status callback, based on the Estimated Completion Date or Bill-To Extension date, with incomplete status
The user is informed that another Shop will do repairs on the renter's car. The user then retrieves a rental contract and changes the shop account on an existing contract.	An incomplete Obtain Repair Status callback exists.	Remove the existing Obtain Repair Status callback for the original Shop account And Create a new Obtain Repair Status callback, for the new Shop account based on the Estimated Completion Date or Bill-To Extension date, with incomplete status

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The user retrieves a rental contract and makes changes that do not satisfy the callback generation criteria for the Obtain Repair Status callback. E.g. Close open ticket ('Open' to 'CLOSED/Pending'), Remove the Shop account.	An incomplete Obtain Repair Status callback exists.	Remove the incomplete Obtain Repair Status callback

2.1.3 *Callback Date for Obtain Repair Status*

Callback Action	Callback Date
Create, Update	• The callback date is the Estimated Completion Date or the Bill-To Extension Date which ever is earlier. • If either the Estimated Completion Date or the Bill-To Extension Date is empty, the callback date is the field that contains a valid date. • If both the Estimated Completion Date and the Bill-To Extension Date is empty, the callback date is the current date. • If the callback date (as determined from above) is less than the current date, use current date.

2.1.4 *Completion Criteria*

The callback is complete when:

- The estimated repair date or the bill-to extension date has changed.

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3. Bill-To Callbacks

3.1 Obtain Initial Authorization

THIS ALSO APPLIES TO RMS CALLBACKS FOR DIRECT BILL (N) CUSTOMERS.

3.1.1 Rental Contract Status

The rental contract status must be:

- Reservation/open
- Open
- Open/pre-write or
- CLOSE/Pending

3.1.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user enters a new Bill-To for a rental contract with Authorization Status as 'Pending' or 'Authorized' without an extension date	No Obtain Initial Authorization callback exists for this new Bill-To.	Create an Obtain Initial Authorization callback with incomplete status
The user retrieves a rental contract and change the authorization status of an existing Bill-To from an 'Authorized' status with a valid Extension Date, Reimbursed, Terminated, or Declined, to 'Pending' or 'Authorized' without an extension date.	No Obtain Initial Authorization callback exists for this existing Bill-To.	Create an Obtain Initial Authorization callback with incomplete status
The user retrieves a rental contract and changes the authorization status of an existing Bill-To from a 'Pending' status to an 'Authorized' status with a valid extension date	An incomplete Obtain Initial Authorization callback exists.	Completes the existing Obtain Initial Authorization callback.

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The user retrieves a rental contract and makes changes that does not satisfy Obtain Initial Authorization callback generation criteria E.g. 1. Set the Authorization Status to Reimbursed, Terminated, or Declined, 2. Void a reservation. 3. Close open ticket ('CLOSE/Pending' to 'CLOSED'), or 4. Remove a Bill-To	An incomplete Obtain Initial Authorization callback exists.	Remove incomplete Obtain Initial Authorization callback

3.1.3 Callback Date for Obtain Initial Authorization

Callback Action	Callback Date
Create	Current Date

3.1.4 Completion Criteria

The callback is complete when:

- The user enters a status of authorized with a valid extension date.

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3.2 Obtain Authorization Extension

THIS DOES NOT APPLY TO RMS.

3.2.1 Rental Contract Status

The rental contract status must be:

- Open
- Open/pre-write or
- Close/pending status.

3.2.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user enters a New Bill-To for a rental contract with given Authorization Status as 'Authorized" and a valid Extension date	No Obtain Authorization Extension callback exists for this new Bill-To.	Create an Obtain Authorization Extension callback, based on the Extension date, with incomplete status. **Note*: An Obtain Initial Authorization **will not** be generated and completed.
The user retrieves a rental contract and changes the authorization status of an existing Bill-To, possibly from 'Pending' to 'Authorized', and gives a valid Extension Date	No Obtain Authorization Extension callback exists for this existing Bill-To.	Create an Obtain Authorization Extension callback, based on the Extension date, with incomplete status **Note*: If an Obtain Initial Authorization callback exists, the Obtain Initial Authorization callback will be completed.
The user retrieves a rental contract and changes the extension date on an existing Bill-To, which is 'Authorized'.	An incomplete Obtain Authorization Extension callback for the previous extension date exists.	Completes the existing Obtain Authorization Extension callback and Create an Obtain Authorization Extension callback, based on the new Extension date, with incomplete status

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The user retrieves a rental contract and makes changes that does not satisfy the generation criteria for the Obtain Authorization Extension callback E.g. 1. Close open ticket ('CLOSE/Pending' to 'CLOSED'), 2. Change Bill-To authorization status from 'Authorized' to any other status, or 3. Remove the Bill-To Extension Date	An incomplete Obtain Authorization Extension callback exists.	Remove incomplete Obtain Authorization Extension callback

3.2.3 *Callback Date for Obtain Authorization Extension*

Callback Action	Callback Date
Create	Extension Date
Update	Extension Date

3.2.4 *Completion Criteria*

The callback is complete when:

- The user changes the authorized date for the bill-to.

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4. Renter Callbacks

4.1 Last Day Notification

Last Day Notification callback is inserted when there is a Renter and the Last Day Date is a valid date. Every time the Last Day Date is changed, a new callback will be created if no incomplete Last Day Notification callback exists. Otherwise, the callback date will be updated if a callback exists with an incomplete status.

4.1.1 Rental Contract Status

The rental contract status be:

- Open
- Open/pre-write

4.1.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user enters a new rental contract and enters a valid last day date (in the future)	No Last Day Notification callback exists for this new Rental.	Create a Last Day Notification callback, based on the last day date, with an incomplete status
The user retrieves a rental contract and changes the last day date.	An incomplete Last Day Notification callback for the original last day date exists.	Update the existing callback date. Callback is still incomplete.
The user retrieves a rental contract and make changes that does not satisfy the generation criteria for the Last Day Notification callback E.g. 1. Change rental status to 'CLOSE/Pending', or 2. Remove the last day date	An incomplete Last Day Notification callback exists.	Remove incomplete Last Day Notification callback

4.1.3 Callback Date

Callback Action	Callback Date
Create, Update	Last Day Date

4.1.4 *Completion Criteria*

The callback is complete when:

1. The user calls the renter and decides to indicate that callback is complete.

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4.2 Balance Due

4.2.1 Rental Contract Status

The rental contract status must be:

- Open
- Open/pre-write or
- Close pending

4.2.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user opens a new rental contract	No Balance Due callback exists for this new Renter.	If renter balance due amount is greater than 0 insert a Balance Due callback with incomplete status. Totaling the renter payments and the bill-to authorizations then subtracting this from the total charges determines the balance due.
The user retrieves a rental contract with an existing Renter and changes are made to either the Renter's payments, Bill-To authorization or any other information related to calculating renter balance due.	An incomplete Balance Due callback exist	If renter balance due amount is greater than 0 update the existing Balance Due callback's date. Totaling the renter payments and the bill-to authorizations then subtracting this from the total charges determines the balance due.
	No Balance Due callback exist for renter	If renter balance due amount is greater than 0 insert a Balance Due callback with incomplete status. Totaling the renter payments and the bill-to authorizations then subtracting this from the total charges determine the balance due. Incomplete
The user retrieves a rental contract and make changes that does not satisfy the generation	An incomplete Balance Due callback exists.	Remove incomplete Balance Due callback

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criteria for a Balance Due callback E.g. 1. Change rental status to 'CLOSE' or 2. Renter balance due amount is less than or equal to all deposits plus credit card authorization plus Bill-To authorization,		

4.2.3 *Callback Date*

Callback Action	Callback Date
Create, Update	The date the balance due exceeds 0.

4.2.4 *Completion Criteria*

The callback is complete when:

1. The user calls renter and indicate that callback is complete. The user decides.

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4.3 Past Estimated Return Date

4.3.1 Rental Contract Status

The rental contract status be:

- Open
- Open/pre-write

4.3.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user opens a ticket and enters an estimated return date.	No Past Estimated Return Date callback exists for this new Renter.	Create a Past Estimated Return Date callback with an incomplete status
The user opens a ticket and does not enter an estimated return date.	No Past Estimated Return Date callback exists for this new Renter	Do not create a callback.
The user retrieves a rental contract and changes the estimated return date.	An incomplete Past Estimated Return Date callback for the original estimated return date exists.	Completes the existing Past Estimated Return Date callback and Creates a new Past Estimated Return Date callback with an incomplete status for the new estimated return date
The user retrieves a rental contract and makes changes that does not satisfy the generation criteria for the Past Estimated Return Date callback E.g. 1. Change rental status to 'CLOSE/Pending', or 2. Remove the estimated return date	An incomplete Past Estimated Return Date callback exists.	Remove the incomplete Past Estimated Return Date callback

4.3.3 Callback Date

Callback Action	Callback Date
Create	Estimated Return Date

Callback Action	Callback Date
Update	Estimated Return Date, if Estimated Return Date Changed

4.3.4 Completion Criteria

The callback is complete when:

1. Estimated Return Date changed.

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4.4 Ticket Rewrite

4.4.1 Rental Contract Status

The rental contract status must be:

- Open or
- Open/pre-write

4.4.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user opens a ticket.	No Ticket Rewrite callback exists for this new ticket.	Create a Ticket Rewrite callback with incomplete status
The user retrieves a rental contract and changes the rental status to 'CLOSE/Pending' or 'CLOSE'.	An incomplete Ticket Rewrite callback exists.	Complete the Ticket Rewrite callback

4.4.3 Callback Date

Callback Action	Callback Date
Create, Update	27 days after the ticket is opened.

4.4.4 Completion Criteria

Estimated Return Date is changed

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4.5 Maximum Authorized Amount Reached

4.5.1 Rental Contract Status

The rental contract status must be:

- Open or
- Open/pre-write

4.5.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user opens a ticket with a new Bill-To	No Maximum Authorized Amount Reached callback exists for this new Renter.	Create a Maximum Authorized Amount Reached callback.
The user retrieves a rental contract with an existing Bill-To and changes information that determines estimated charges and Bill-To has not been notified of Maximum Authorized Amount Reached callback	An incomplete Maximum Authorized Amount Reached callback exists.	Completes the existing Maximum Authorized Amount callback and set Bill-To notified of Maximum Authorized Amount
The user retrieves a rental contract and make changes that does not satisfy to generate a Maximum Authorized Amount callback E.g. 1. Change rental status to 'CLOSE/Pending') or CLOSED, or 2. Void Bill-To	An incomplete Maximum Authorized Amount callback exists.	Remove incomplete Maximum Authorized Amount callback

4.5.3 Callback Date

Callback Action	Callback Date
Create	(Date that estimated charges for Bill-To's authorized amount) minus 1 day
Update	(Date that estimated charges for Bill-To's authorized amount) minus 1 day

4.5.4 *Completion Criteria*

To be determined

5. RMS Callbacks

5.1 Initial Shop Callback Date

The initial shop callback is based on one of two files from legacy. Based upon the RMS customer number, and the group/branch that has the callback, the system will look up in table _____ (from file CB030P) what the callback date should be. This table gives the system a number of days for the initial callback based on the customer number. If the callback date (based on CB030P) is later than the bill-to extension date, then it will be the extension date. If there is not an entry for the customer/group/branch combination, the callback date is immediate.

5.1.1 *Rental Contract Status*

The rental contract status be:

- Open
- Open/pre-write

5.1.2 *Scenarios*

Scenario	Callback and Status at event of Scenario	Action
A new rental contract is entered with an RMS Bill-To Account. The customer/group/branch data exists in table CB030P	No Initial RMS Shop callback exists	Create a Initial RMS Shop Callback based on the CB030P table
A new rental contract is entered with an RMS Bill-To Account. The customer/group/branch data does not exist in table CB030P	No Initial RMS Shop callback exists	Create a Initial RMS Shop Callback for today.
An existing rental contract, with an RMS Bill-To is modified so that the Bill-To is a different RMS Account	An incomplete Initial RMS Shop callback exists	Delete the Initial RMS Shop Callback and create a new one based on the CB030 table or for today.

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The user retrieves a rental contract and makes changes that does not satisfy the generation criteria for the Initial Shop callback E.g. 1. Change rental status to 'CLOSE/Pending', or 2. Changes the Bill-To information such that the Bill-To is not an RMS customer.	An incomplete RMS Shop callback exists.	Remove incomplete RMS Shop Callback

5.1.3 Callback Date

Callback Action	Callback Date
Create	• If no data exists for the RMS account in CB030P table, then the callback date is the current date. • If data exists in the CB030P table, then the callback date is the Bill-To extension date or the date generated by CB030P, whichever is earlier.

5.1.4 Completion Criteria

The callback is complete when:
1. The user calls the body shop and decides to indicate that callback is complete.

5.2 Subsequent Shop Callback Date

The subsequent RMS Shop Callback Dates are based upon the user entry while they are performing the previous callback and the bill-to extension date. This will be covered in more detail in the Perform Callback portion of the project.

5.2.1 Rental Contract Status

The rental contract status be:

- Open

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5.2.2 Scenarios

Scenario	Callback and Status at event of Scenario	Action
The user performs an RMS Shop callback and enters a date for the next callback to be performed		Create a subsequent callback based on the user-entered date or bill-to extension date.
The user retrieves a rental contract and makes changes that does not satisfy the generation criteria for the Initial Shop callback E.g. 3. Change rental status to 'CLOSE/Pending', or 4. Changes the Bill-To information such that the Bill-To is not an RMS customer.	An incomplete RMS Shop callback exists.	Remove incomplete RMS Shop Callback

5.2.3 Callback Date

Callback Action	Callback Date
Create	The callback date will be either the date the user entered or the bill-to extension date whichever is earlier.

5.2.4 Completion Criteria

The callback is complete when:

1. The user calls the body shop and decides to indicate that callback is complete.

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ECARS 2.0
Supplementary Specifications: Callback Summary Print

Version 1.2

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Revision History

Date	Version	Description	Author
November 6, 2001	1.0	Creation	Leanne Waugh
November 8, 2001	1.1	Updates based on feedback from Jon and Mary	Leanne Waugh
November 29,2001	1.2	Updated based on new print method of having the user select which report to print via a pop-up.	Leanne Waugh

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Supplementary Specification

1. Introduction

This document details the print requirements for the Callback Summary screens. It is inclusive of all methods of callbacks including: Manual, Automated, Fax and RMS. It is also inclusive of the types of callbacks including: Shop, Bill-To and Renter.

2. Print Dialog Box

When the user selects to print, the system will display the Internet Explorer standard print dialog box. This dialog box does not have any Hot Keys and the OK button is the default button.

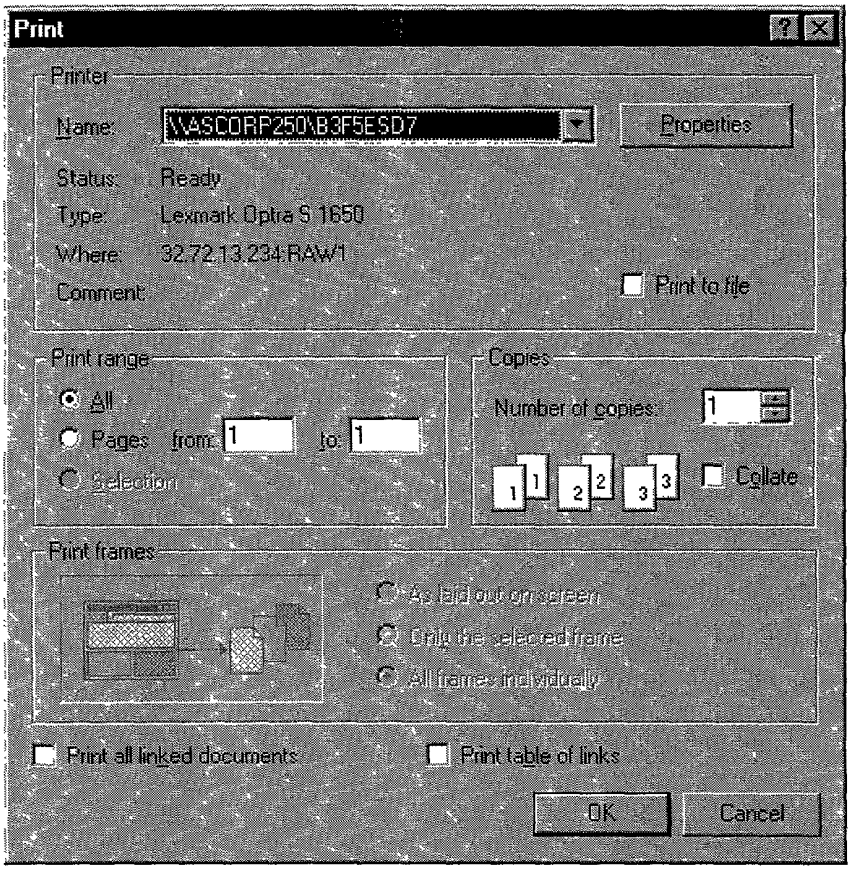

Figure 1: Standard Internet Explorer Print Dialog

3. Callback Summary Screen

As specified in the Callback Summary Screen Action Specification, the user will have the opportunity to print at any time. If there is more than one table that could potentially be printed, the system will provide the user with a pop-up to select the report to be printed.

The data that the user is looking at will determine what information is printed. For example, if the user is viewing Manual, Bill-To callbacks for Group/Branch 0101, presses the Print List button and selects to print the Account list on the Callback Summary Print Dialog, then the system will print the 'Account List' for Manual, Bill-To callbacks for 0101 in the format specified below .

There are four different types of tables that the user might print – Account, Contact, Contract and Renter. Each of these tables corresponds to a different report.

All of the printed reports will follow the standard report standards including column justification, font style and size.

To meet American and European requirements, reports must be able to be printed on A4 and 8 ½ by 11 sized paper.

All report data will be sorted alphabetically according to the left most field on the report. In the situations where a person's name is the left most field, the data will be sorted by last name.

The report header data, including the column headers will be repeated at the top of every page.

3.1 Account List

This report prints the following pieces of data for the selected Callback method, type, group and branch:

- Name
- Phone Number
- Number of Calls
- Left Messages
- Account Number
- Address

This report will include a header that informs the user of the type of callback, the selected group/branch and the date/time.

For RMS callbacks the group/branch in the header will be the terminal location that the user is logged in at. As shown in the example report below, RMS Shop Callbacks will also include the selected RMS Customer. RMS Bill-To Callbacks will not have this field .

RMS Callbacks have a method of Manual except for the ARMS Auto type of callbacks and then the method is Automated .

Examples of the Standard Account and RMS Shop Account List reports are items A1 and A2 in the appendix

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3.2 Contact List

This report prints the following pieces of data for the selected Callback method, type, group, branch and account:

- Name
- Phone Number
- Number of Calls
- Left Messages

This report will include a header that informs the user of the type of callback, the selected group/branch, the selected account and the date/time .

For RMS callbacks the group/branch in the header will be the terminal location that the user is logged in at. As shown in the example report below, RMS Shop Callbacks will also include the selected RMS Customer. RMS Bill-To Callbacks will not have this field.

RMS Callbacks have a method of Manual except for the ARMS Auto type of callbacks and then the method is Automated .

Examples of the Standard Contact and RMS Shop Contact List reports are items A3 and A4 in the appendix

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3.3 Contract List

This report prints the following pieces of data for the selected Callback method, type, group, branch and contact:

- Name
- Contract Status
- Vehicle
- Claim/Pol/PO/RO
- Date of Loss
- Primary Reason
- Today's Action
- Days Outstanding
- Group/Branch

This report will include a header that informs the user of the type of callback, the selected group/branch and the date/time.

For RMS callbacks the group/branch in the header will be the terminal location that the user is logged in at. As shown in the example report below, RMS Shop Callbacks will also include the selected RMS Customer. RMS Bill-To Callbacks will not have this field.

RMS Callbacks have a method of Manual except for the ARMS Auto type of callbacks and then the method is Automated.

Examples of the Standard Contract and RMS Shop Contract List reports are items A5 and A6 in the appendix

If the user has selected 'All' contacts in the contacts table, the Contract report is slightly different. The report will print all of the contracts, grouping them by contact name. There will be a page break between contacts. It will follow the same format as the standard contract.

Examples of the Standard Account and RMS Shop Account List with All Contacts Selected reports are items A7 and A8 in the appendix

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3.4 Renter List

This report prints the following pieces of data for the selected Callback method, type, group and branch:

- Name
- Contract Status
- Current Amount Due
- Payment Type
- Home Phone Number
- Primary Reason
- Today's Action
- Days Outstanding
- Contract Number

This report will include a header that informs the user of the type of callback, the selected group/branch and the date/time.

This report does not apply to RMS Callbacks.

An Example of the Renter List report is item A9 in the appendix

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Appendix A
Callback Summary Report Examples

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A1. Standard Account List

Callback Account List

Callback Type: Bill-To
Callback Method: Manual
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52 A

Name	Phone Number	Number of Calls	Left Messages	Account Number	Address
AAA Insurance	314-555-1111	2	0	AAA1010	1 Maple Street Ave.
Allstate Ins	314-555-6666	1	2	ALL0101	3 Elm Avenue
My Insurance Co	314-555-1010	10	10	MIC0101	6 Cherry Lane
Other Insurance Co.	636-555-1111	12	12	OTH01011	4 Edgar Road
Some Guy's Ins.	636-555-7070	2	2	SGI1010	5 Glendale
State Farm Ins.	314-555-9119	0	0	STF0100	2 Main Street

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A2. RMS-Shop Account List

Callback Account List

Callback Type: RMS – Shop
Callback Method: Manual
RMS Customer: STF0101 – State Farm
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A

Name	Phone Number	Number of Calls	Left Messages	Account Number	Address
Bob's Auto Body	314-555-1111	2	0	BAB1010	1 Maple Street Ave.
Carl's Cars	314-555-6666	1	2	CC0101	3 Elm Avenue
Davis Brothers	314-555-1010	10	10	DBA0101	6 Cherry Lane
George Incorporated	636-555-1111	12	12	GEI01011	4 Edgar Road
Some Guy's Fix-It	636-555-7070	2	2	SGF1010	5 Glendale
Zabor Auto Body.	314-555-9119	0	0	ZAB0100	2 Main Street

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A3. Standard Contact List

Callback Contact List

Callback Type: Bill-To
Callback Method: Manual
Account: STF0101 – State Farm
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A

Name	**Phone Number**	Number of Calls	Left Messages
Mary Adams	314-555-9090	3	2
Mike Brady	314-555-0009	2	0
Nicole Jones	314-555-1020	0	0
Joe Kuebler	636-555-0101 ext 3	2	1
Samantha Peters	314-555-6432 ext 10	1	0
John Smith	636-555-1212	0	0
Andy Warren	314-555-7867 ext 100	2	1

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A4. RMS-Shop Contact List

Callback Contact List

Callback Type: RMS – Shop
Callback Method: Manual
RMS Account: STF0101 – State Farm
Account: BAB0101 - Bob's Auto Body
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A

Name	Phone Number	Number of Calls	Left Messages
Mary Adams	314-555-9090	3	2
Mike Brady	314-555-0009	2	0
Nicole Jones	314-555-1020	0	0
Joe Kuebler	636-555-0101 ext 3	2	1
Samantha Peters	314-555-6432 ext 10	1	0
John Smith	636-555-1212	0	0
Andy Warren	314-555-7867 ext 100	2	1

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A5. Standard Contract List

Callback Contract List

Callback Type: Bill-To
Callback Method: Manual
Account: STF0101 – State Farm
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A
Contact: Mary Adams
Phone: 314-555-9090

Name	Stat.	Vehicle	**Claim/Pol /PO/RO**	Date of Loss	**Primary Reason**	**Today's Action**	**Days Out.**	**Group /Branch**
John Doe	O	Ford Escort	101010	10/20/2001	Auth Ext.	Left Message	2	0102
Dan Egleston	O	Honda Civic	393939	11/02/2001	Init Auth	No Answer	0	0101
James Farwig	O	VW Jetta	2	09/02/2001	Auth Ext.		10	0103
Julie Loft	CP	BMW 320i	20929	10/31/2001	Auth Ext.		2	0124
Richard Smith	R	Honda Prelude	1a021	11/01/2001	Init Auth	Will Call Back	1	0115

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A6. RMS-Shop Contract List

Callback Contract List

Callback Type: RMS - Shop
Callback Method: Manual
RMS Account: STF0101 – State Farm
Account: BAB0101 – Bob's Auto Body
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A
Contact: Mary Adams
Phone: 314-555-9090

Name	Stat.	Vehicle	**Claim/Pol /PO/RO**	Date of Loss	**Primary Reason**	**Today's Action**	**Days Out.**	**Group /Branch**
John Doe	O	Ford Escort	101010	10/20/2001	Auth Ext.	Left Message	2	0102
Dan Egleston	CP	Honda Civic	393939	11/02/2001	Init Auth	No Answer	0	0101
James Farwig	O	VW Jetta	2	09/02/2001	Auth Ext.		10	0103
Julie Loft	O	BMW 320i	20929	10/31/2001	Auth Ext.		2	0124
Richard Smith	R	Honda Prelude	1a021	11/01/2001	Init Auth	Will Call Back	1	0115

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A7. Standard Contract List – All Contacts Selected

Callback Contract List

Callback Type: Bill-To
Callback Method: Manual
Account: STF0101 – State Farm
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A
Contact: Mary Adams
Phone: 314-555-9090

Name	Stat.	Vehicle	Claim/Pol /PO/RO	Date of Loss	Primary Reason	Today's Action	Days Out.	Group /Branch
John Doe	O	Ford Escort	101010	10/20/2001	Auth Ext.	Left Message	2	0102
Dan Egleston	O	Honda Civic	393939	11/02/2001	Init Auth	No Answer	0	0101
James Farwig	O	VW Jetta	2	09/02/2001	Auth Ext.		10	0103
Julie Loft	CP	BMW 320i	20929	10/31/2001	Auth Ext.		2	0124
Richard Smith	R	Honda Prelude	1a021	11/01/2001	Init Auth	Will Call Back	1	0115

-----Page Break----

Callback Contract List

Callback Type: Bill-To
Callback Method: Manual
Account: STF0101 – State Farm
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A
Contact: Mike Brady
Phone: 314-555-0009

Name	Stat.	Vehicle	Claim/Pol /PO/RO	Date of Loss	Primary Reason	Today's Action	Days Out.	Group /Branch
John Doe	O	Ford Escort	101010	10/20/2001	Auth Ext.	Left Message	2	0102
Dan Egleston	O	Honda Civic	393939	11/02/2001	Init Auth	No Answer	0	0101
James Farwig	O	VW Jetta	2	09/02/2001	Auth Ext.		10	0103
Julie Loft	CP	BMW 320i	20929	10/31/2001	Auth Ext.		2	0124

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Richard Smith	R	Honda Prelude	1a021	11/01/2001	Init Auth	Will Call Back	1	0115	

Rest of Contacts to Follow.

A8. RMS Shop Contract List – All Contacts Selected

Callback Contract List

Callback Type: RMS - Shop
Callback Method: Manual
RMS Account: STF0101 – State Farm
Account: BAB0101 – Bob's Auto Body
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A
Contact: Mary Adams
Phone: 314-555-9090

Name	Stat.	Vehicle	Claim/Pol /PO/RO	Date of Loss	Primary Reason	Today's Action	Days Out.	Group /Branch
John Doe	O	Ford Escort	101010	10/20/2001	Auth Ext.	Left Message	2	0102
Dan Egleston	CP	Honda Civic	393939	11/02/2001	Init Auth	No Answer	0	0101
James Farwig	O	VW Jetta	2	09/02/2001	Auth Ext.		10	0103
Julie Loft	O	BMW 320i	20929	10/31/2001	Auth Ext.		2	0124
Richard Smith	R	Honda Prelude	1a021	11/01/2001	Init Auth	Will Call Back	1	0115

--- Page Break---

Callback Contract List

Callback Type: RMS - Shop
Callback Method: Manual
RMS Account: STF0101 – State Farm
Account: BAB0101 – Bob's Auto Body
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A
Contact: Mike Brady
Phone: 314-555-0009

Name	Stat.	Vehicle	Claim/Pol /PO/RO	Date of Loss	Primary Reason	Today's Action	Days Out.	Group /Branch
John Doe	O	Ford Escort	101010	10/20/2001	Auth Ext.	Left Message	2	0102
Dan Egleston	CP	Honda Civic	393939	11/02/2001	Init Auth	No Answer	0	0101
James Farwig	O	VW Jetta	2	09/02/2001	Auth Ext.		10	0103
Julie Loft	O	BMW 320i	20929	10/31/2001	Auth Ext.		2	0124
Richard Smith	R	Honda Prelude	1a021	11/01/2001	Init Auth	Will Call	1	0115

Back

Rest of Contacts to Follow.

A9. Renter List

Callback Renter List

Callback Method: Renter
Callback Type: Manual
Group/Branch: 0101 – Ladue
Date/Time: 11/2/2001 11:52A

Name	Stat.	Current Amount Due	Payment Type	Home Phone Number	Primary Reason	Today's Action	Days Out.	Contract Number
James Doe	O	$100.00	Cash	314-555-5345	Balance Due	Left Message	10	Ad34jk
Allie Edwards	CP	$0.00	Credit Card	314-555-1103	Max. Auth	No Answer	1	2A299
George Dire	R	$0.00	Cash	314-555-6542	Ticket Rewrite		1	11399A

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Callback
Callback Supplementary Specification

Version <1.0>

Revision History

Date	Version	Description	Author
15-May-01	1.0	Creation	Pin Koh
11-Jun-01	1.1	Changed scenario description of all rules	Pin Koh
14-Jun-01	1.11	Changed English	David Flynn
07-Aug-01	1.12	Changed wording on the Renter scenarios	Leanne Bevelhimer
13-Aug-01	1.13	Re-worded scenarios	Leanne Bevelhimer
14-Aug-01	1.2	Updated based on meeting with Mary and Jon	Leanne Bevelhimer

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Callback Supplementary Specification

1. Introduction

The **Supplementary Specification** captures the system requirements that are not readily captured in the all use cases of the use-case model for callback

1.1 Purpose

The purpose of this document is to detail callback generation and completion for all rules.

1.2 Scope

This document supports all the use cases pertaining to the **Callback** project.

1.2.1.1 Definitions, Acronyms and Abbreviations

Refer to the **Glossary** document for details.

1.3 References

Generate Callback Use Case

1.4 Overview

The main content of this document attempts to document in detail the business rule that governs the life-cycle of all callbacks. It describes the conditions, actions and results that affects callbacks.

2. Functionality

This section describes the rules to generate, update, complete and remove callbacks. Also described is the determination of date to make the callback.

2.1 Callback Date

Callback date is defined as the **date to perform** the callback and is determined differently by each rule.
For new callback, this data should not be less than the date of creation of callback - user callbacks should not be penalized with a back dated callback that is created today.

2.2 Obtain Repair Status

2.2.1 General Rule- Obtain Repair Status requires that the rental contract status be open

Scenario	Callback and Status at event of Scenario	Action
S1 The user enters a new Shop for a new or existing rental. The Estimated Completion date is optional.	No Obtain Repair Status callback exists for this new shop	Create an Obtain Repair Status callback, based on the Estimated Completion Date or Bill-To Extension date, with incomplete status
S2 The user retrieves a rental contract. The user then changes the Estimated Completion Date or Bill-To Extension Date to a valid date.	An incomplete Obtain Repair Status callback exists.	Complete the existing Obtain Repair Status callback and Create an Obtain Repair Status callback, based on the Estimated Completion Date or Bill-To Extension date, with incomplete status

S3 The user is informed that another Shop will do repairs on the renter's car. The user then retrieves a rental contract and changes the shop account on an existing contract.	An incomplete Obtain Repair Status callback exists.	Remove the existing Obtain Repair Status callback for the original Shop account and Create a new Obtain Repair Status callback, for the new Shop account based on the Estimated Completion Date or Bill-To Extension date, with incomplete status
S4 The user retrieves a rental contract and makes changes that does not satisfy the callback generation criteria for the Obtain Repair Status callback. E.g. 1. Close open ticket ('Open' to 'CLOSED/Pending'), 2. Remove the Shop account.	An incomplete Obtain Repair Status callback exists.	Remove the incomplete Obtain Repair Status callback

2.2.1.1 Callback Date for Obtain Repair Status

Obtain Repair Status Callback date will be greater or equal to the date of Event

Callback Action	Callback Date
Create, Update	• The callback date is the Estimated Completion Date or the Bill-To Extension Date which ever is earlier. • If either the Estimated Completion Date or the Bill-To Extension Date is empty, the callback date is the field that contains a valid date.

Callback Action	Callback Date
	• If both the Estimated Completion Date and the Bill-To Extension Date is empty, the callback date is the current date. • If the callback date (as determined from above) is less than the current date, use current date.

2.2.2 Obtain Repair Status (RMS) Rule

Generation rule will follow the general rule.

2.2.2.1 Callback Date for Obtain Repair Status (RMS) Rule

Callback date is determined by the following order:

1. Callback Date* of RMS Callback Contract by Group/Branch/Ticket Legacy file(CB032P)
Where
CB032P Legacy Rental Contract Number = Rental Contract Number
AND
CB032P Group ID = Owning Group ID
AND
CB032P Branch ID = Owning Branch ID
OR
2. Next nearest Date of Day of Call** of RMS Customer Legacy file (CB030P)
Where
CB030P Customer Number = Bill-To's Customer number
OR

3. Minimum of (Estimated Completion Date, Bill-To(not of Shop)'s Extension Date , Date of Insertion of callback)
*This date is an absolute date (e.g. Jan 01 2002) and should be final and cannot be changed or affected by thresholds or slides
**This day is of value 1 to 7 - matching day of the week (1 representing Monday). Should not be affected by thresholds or slides

2.2.3 Obtain Repair Status (ARMS) Rule

Generation rule will follow the general rule.

2.2.3.1 Callback Date for Obtain Repair Status (ARMS) Rule

Determined by the following order:
1. Minimum (Estimated Completion Date, Shop's Extension Date) - 1 day
Where
Rental Contract's Reservation Origin = 'ARMS'
AND
Bill-To's Customer Sequence Number = ARMSPR1's Profile ID
AND
ARMSPR1 P1YN21 = 'Y'
OR
2. Minimum of (Estimated Completion Date, Bill-To(not of Shop)'s Extension Date , Date of Insertion callback)

2.2.4 Completion Criteria

2.2.4.1 General Rule

Callback is complete when:
Estimated Completion Date is changed
OR
Extension date of Bill-To(not of Shop)'s Extension Date is changed.

2.2.4.2 ARMS

Same as above.

2.2.4.3 RMS

Same as above.

2.3 Obtain Initial Authorization

2.3.1 General Rule- Obtain Initial Authorization requires that the rental contract status to be 'reservation/open', 'open', 'open/pre-write', or 'CLOSE/Pending'

Scenario	Callback and Status at event of Scenario	Action
S1 The user enters a new Bill-To for a rental contract with Authorization Status as 'Pending' or 'Authorized' without an extension date	No Obtain Initial Authorization callback exists for this new Bill-To.	Create an Obtain Initial Authorization callback with incomplete status
S3 The user retrieves a rental contract and change the authorization status of an existing Bill-To from an 'Authorized' status with a valid Extension Date, Reimbursed, Terminated, or Declined, to 'Pending' or 'Authorized' without an extension date .	No Obtain Initial Authorization callback exists for this existing Bill-To.	Create an Obtain Initial Authorization callback with incomplete status
S2 The user retrieves a rental contract and changes the authorization status of an existing Bill-To from a 'Pending' status to an 'Authorized' status with a valid extension date	An incomplete Obtain Initial Authorization callback exists.	Completes the existing Obtain Initial Authorization callback.
S4 The user retrieves a rental contract and makes changes that does not satisfy Obtain Initial Authorization callback generation criteria E.g. 1. Set the Authorization Status to Reimbursed,, Terminated, or Declined, 2. Void a reservation., 3. Close open ticket ('CLOSE/Pending' to 'CLOSED'), or	An incomplete Obtain Initial Authorization callback exists.	Remove incomplete Obtain Initial Authorization callback

4. Remove a Bill-To		

2.3.1.1 Callback Date for Obtain Initial Authorization

Initial Authorization Callback date will be equal to the date of Event

Callback Action	Callback Date
Create	Current Date

2.3.2 Obtain Initial Authorization (RMS) Rule

Generation rule will follow the general rule .

2.3.2.1 Callback Date for Obtain Initial Authorization (RMS) Rule

Callback date is determined by the following order :

1. Callback Date* of RMS Callback Contract by Group/Branch/Ticket Legacy file(CB032P)
Where
CB032P Legacy Rental Contract Number = Rental Contract Nbr
AND
CB032P Group ID = Owning Group ID
AND
CB032P Branch ID = Owning Branch ID
OR
2. Next nearest Date of Day of Call** of RMS Customer Legacy file (CB030P)
Where
CB030P Customer Number = Bill-To's Customer number
OR

3. Date of insertion of callback
*This date is an absolute date (e.g. Jan 01 2002) and should be final and cannot be changed or affected by thresholds or slides
**This day is of value 1 to 7 - matching day of the week (1 representing Monday). Should not be affected by thresholds or slides

2.3.3 Completion Criteria

2.3.3.1 General Rule

Callback is complete when:
1. Authorization Status of value other than 'Pending' and Null
AND
2. Bill-To Extension Date is Not Null

2.3.3.2 RMS

Same as above.

2.4 Obtain Authorization Extension

2.4.1 General Rule - The following scenarios apply only to those rental contracts that are in an open, open/pre-write, or close/pending status.

Scenario	Callback and Status at event of Scenario	Action
S1 The user enters a New Bill-To for a rental contract with given Authorization Status as 'Authorized" and a valid Extension date	No Obtain Authorization Extension callback exists for this new Bill-To.	Create an Obtain Authorization Extension callback, based on the Extension date, with incomplete status. **Note*: An Obtain Initial Authorization **will not** be generated and completed.
S2 The user retrieves a rental contract and changes the authorization status of an existing Bill-To, possibly from 'Pending' to 'Authorized', and gives a valid Extension Date	No Obtain Authorization Extension callback exists for this existing Bill-To.	Create an Obtain Authorization Extension callback, based on the Extension date, with incomplete status **Note*: If an Obtain Initial Authorization callback exists, the Obtain Initial Authorization callback will be completed.
S3 The user retrieves a rental contract and changes the extension date on an existing Bill-To which is 'Authorized'.	An incomplete Obtain Authorization Extension callback for the previous extension date exists.	Completes the existing Obtain Authorization Extension callback and Create an Obtain Authorization Extension callback, based on the new Extension date, with incomplete status

S4 The user retrieves a rental contract and makes changes that does not satisfy the generation criteria for the Obtain Authorization Extension callback E.g. 1. Close open ticket ('CLOSE/Pending' to 'CLOSED'), 2. Change Bill-To authorization status from 'Authorized' to any other status, or 3. Remove the Bill-To Extension Date	An incomplete Obtain Authorization Extension callback exists.	Remove incomplete Obtain Authorization Extension callback

2.4.1.1 Callback Date for Obtain Authorization Extension

Callback Action	Callback Date
Create	Extension Date
Update	Extension Date

2.4.2 Obtain Initial Authorization (RMS) Rule

Generation rule will follow the general rule.

2.4.2.1 Callback Date for Obtain Authorization Extension(RMS) Rule

Callback date is determined by the following order:

1. Callback Date* of RMS Callback Contract by Group/Branch/Ticket Legacy file(CB032P)

Where

CB032P Legacy Rental Contract Number = Rental Contract Number

AND
CB032P Group ID = Owning Group ID
AND
CB032P Branch ID = Owning Branch ID
OR
2. Next nearest Date of Day of Call** of RMS Customer Legacy file (CB030P)
Where
CB030P Customer Number = Bill-To's Customer number
OR
3. Date of insertion of callback
*This date is an absolute date (e.g. Jan 01 2002) and should be final and cannot be changed or affected by thresholds or slides
**This day is of value 1 to 7 - matching day of the week (1 representing Monday). Should not be affected by thresholds or slides

2.4.3 Completion Criteria

2.4.3.1 General Rule

Callback is complete when:
1. Authorization Status is 'Authorized'
AND
2. Bill-To Extension Date is changed

2.4.3.2 RMS

Same as above.

2.5 Last Day Notification

Last Day Notification callback is inserted when there is a Renter and the Last Day Date is a valid date. Every time the Last Day Date is changed, a new callback will be created if no incomplete Last Day Notification callback exists. Otherwise, the callback date will be updated if a callback exists with an incomplete status.

2.5.1 General Rule – Last Day Notification requires that the rental contract status be open, open/pre-write

Scenario	Callback and Status at event of Scenario	Action
S1 The user enters a new rental contract and enters a valid last day date (in the future)	No Last Day Notification callback exists for this new Rental.	Create a Last Day Notification callback, based on the last day date, with an incomplete status
S2 The user retrieves a rental contract and changes the last day date.	An incomplete Last Day Notification callback for the original last day date exists.	Update the existing callback date. Callback is still incomplete.
S3 The user retrieves a rental contract and make changes that does not satisfy the generation criteria for the Last Day Notification callback E.g. 1. Change rental status to 'CLOSE/Pending', or 2. Remove the last day date	An incomplete Last Day Notification callback exists.	Remove incomplete Last Day Notification callback

2.5.2 Callback Date

Callback Action	Callback Date
Create, Update	Last Day Date

2.5.3 Completion Criteria

Callback is complete when:

1. The user calls the renter and decides to indicate that callback is complete.

2.6 Balance Due

2.6.1 General Rule – Balance Due requires that the rental contract status be open, open/pre-write, or close pending.

Scenario	Callback and Status at event of Scenario	Action
S1 The user opens a new rental contract	No Balance Due callback exists for this new Renter.	If renter balance due amount is greater than 0 insert an Balance Due callback with incomplete status. Totaling the renter payments and the bill-to authorizations then subtracting this from the total charges determines the balance due.incomplete
S2 The user retrieves a rental contract with an existing Renter and changes are made to either the Renter's payments, Bill-To authorization or any other information related to calculating renter balance due.	An incomplete Balance Due callback exist	If renter balance due amount is greater than 0 update the existing Balance Due callback's date. Totaling the renter payments and the bill-to authorizations then subtracting this from the total charges determines the balance due.
	No Balance Due callback exist for renter	If renter balance due amount is greater than 0 insert a Balance Due callback with incomplete status. Totaling the renter payments and the bill-to authorizations then subtracting this from the total charges determine the balance due.incomplete
S3 The user retrieves a rental contract and make changes that does not satisfy the generation criteria for a Balance Due callback E.g.	An incomplete Balance Due callback exist.	Remove incomplete Balance Due callback

1. Change rental status to 'CLOSE' or 2. Renter balance due amount is less than or equal to all deposits plus credit card authorization plus Bill-To authorization,		

2.6.2 Callback Date

Callback Action	Callback Date
Create, Update	The date the balance due exceeds 0.

2.6.3 Completion Criteria

Callback is complete when:
1. The user calls renter and indicate that callback is complete. The user decides.

2.7 Past Estimated Return Date

2.7.1 General Rule - Past Estimated Return Date requires that the rental contract status be open, open/pre-write

Scenario	Callback and Status at event of Scenario	Action
S1 The user opens a ticket and enters an estimated return date.	No Past Estimated Return Date callback exists for this new Renter.	Create a Past Estimated Return Date callback with an incomplete status
S2 The user opens a ticket and does not enter an estimated return date.	No Past Estimated Return Date callback exists for this new Renter	Do not create a callback.
S3 The user retrieves a rental contract and changes the estimated return date.	An incomplete Past Estimated Return Date callback for the original estimated return date exist.	Completes the existing Past Estimated Return Date callback and Creates a new Past Estimated Return Date callback with an incomplete status for the new estimated return date

S4 The user retrieves a rental contract and makes changes that does not satisfy the generation criteria for the Past Estimated Return Date callback E.g. 1. Change rental status to 'CLOSE/Pending', or 2. Remove the estimated return date	An incomplete Past Estimated Return Date callback exists.	Remove the incomplete Past Estimated Return Date callback

2.7.2 Callback Date

Callback Action	Callback Date
Create	Estimated Return Date
Update	Estimated Return Date, if Estimated Return Date Changed

2.7.3 Completion Criteria

Callback is complete when:

1. Estimated Return Date changed.

2.8 Ticket Rewrite

2.8.1 General Rule – Ticket Rewrite requires that the rental contract status be open, open/pre-write

Scenario	Callback and Status at event of Scenario	Action
S1 The user opens a ticket.	No Ticket Rewrite callback exists for this new ticket.	Create a Ticket Rewrite callback with incomplete status
S2 The user retrieves a rental contract and changes the rental status to 'CLOSE/Pending' or 'CLOSE'.	An incomplete Ticket Rewrite callback exists.	Complete the Ticket Rewrite callback

2.8.2 Callback Date

Callback Action	Callback Date
Create, Update	27 days after the ticket is opened.

2.8.3 Completion Criteria

Estimated Return Date is changed

2.9 Maximum Authorized Amount Reached

2.9.1 General Rule – Maximum Authorized Amount Reached requires that the rental contract status be open, open/pre-write

Scenario	Callback and Status at event of Scenario	Action
S1 The user opens a ticket with a new Bill-To	No Maximum Authorized Amount Reached callback exists for this new Renter.	Create a Maximum Authorized Amount Reached callback.
S2 The user retrieves a rental contract with an existing Bill-To and changes information that	An incomplete Maximum Authorized Amount Reached callback exist.	Completes the existing Maximum Authorized Amount callback and set Bill-To

determines estimated charges and Bill-To has not been notified of Maximum Authorized Amount Reached callback		notified of Maximum Authorized Amount
S3 The user retrieves a rental contract and make changes that does not satisfy to generate a Maximum Authorized Amount callback E.g. 1. Change rental status to 'CLOSE/Pending') or CLOSED, or 2. Void Bill-To	An incomplete Maximum Authorized Amount callback exist.	Remove incomplete Maximum Authorized Amount callback

2.9.2 Callback Date

Callback Action	Callback Date
Create	(Date that estimated charges for Bill-To's authorized amount) minus 1 day
Update	(Date that estimated charges for Bill-To's authorized amount) minus 1 day

2.9.3 Completion Criteria

To be determined

2.10 Miscellaneous

3. Usability

Nil

4. Reliability

Nil

5. Performance

5.1 Callback Generation

Callback should be generated as near real-time as possible

6. Supportability

Nil

7. Design Constraints

Nil

8. Online The user Documentation and Help System Requirements

Nil

9. Purchased Components

Nil

10. Interfaces

Nil

10.1 Hardware Interfaces

Nil

10.2 Software Interfaces

Nil

10.3 Communications Interfaces

Nil

11. Licensing Requirements

Nil

12. Legal, Copyright and Other Notices

Nil

13. Applicable Standards

Nil

ECARS 2.0
Screen Action Specification: Callback Summary

Version 1.0

Revision History

Date	Version	Description	Author
04/12/2001	1.0	Created Screen Action Specification	David Flynn
7/13/2001	1.01	Added Addendum for expandable table. Updated Screen shots to current implementation	David Flynn
8/14/2001	1.02	Updated wording to be more consistent with the newer versions.	

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Screen Action Specification

1. Introduction

2. Screen Print

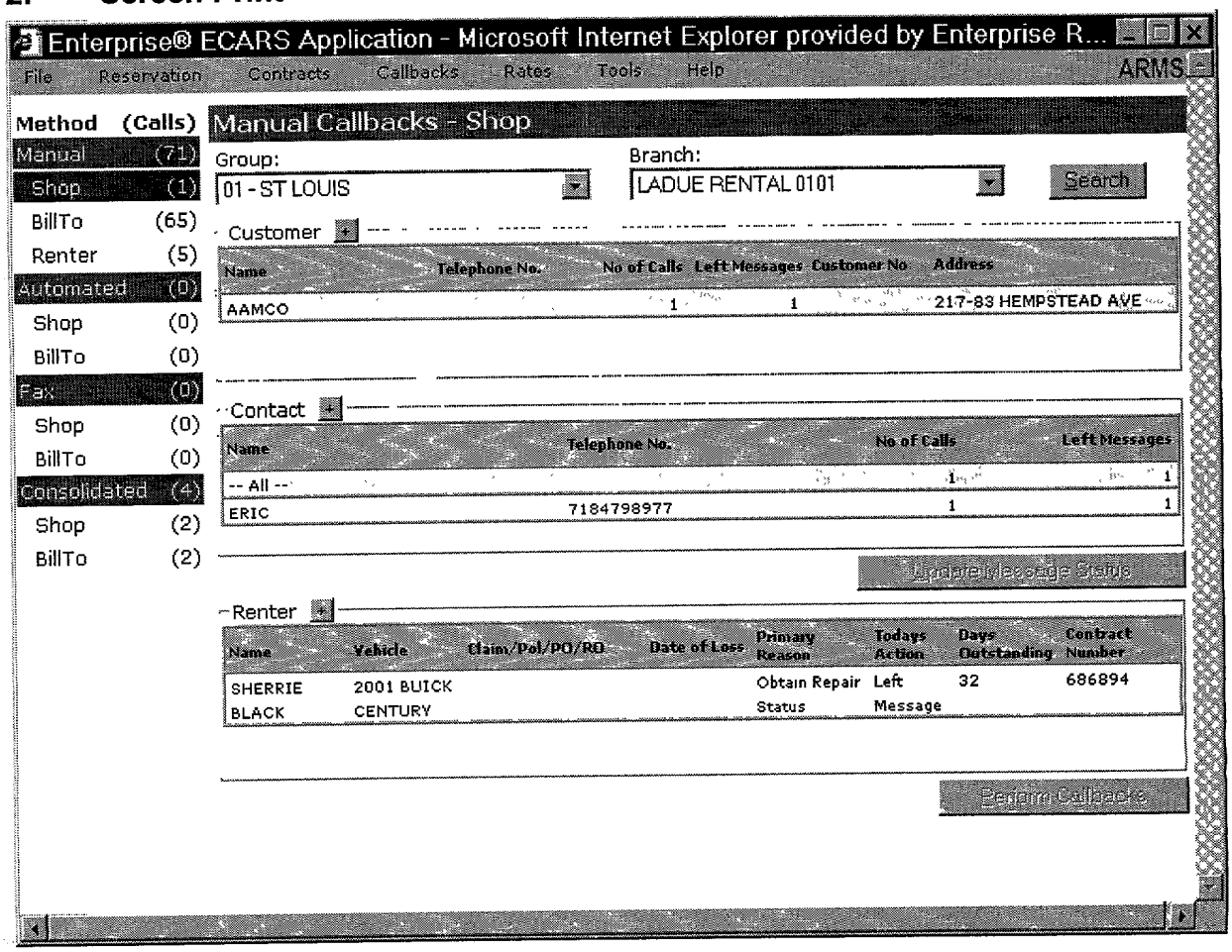

Figure 1: Shop and Bill To Callback Summary.

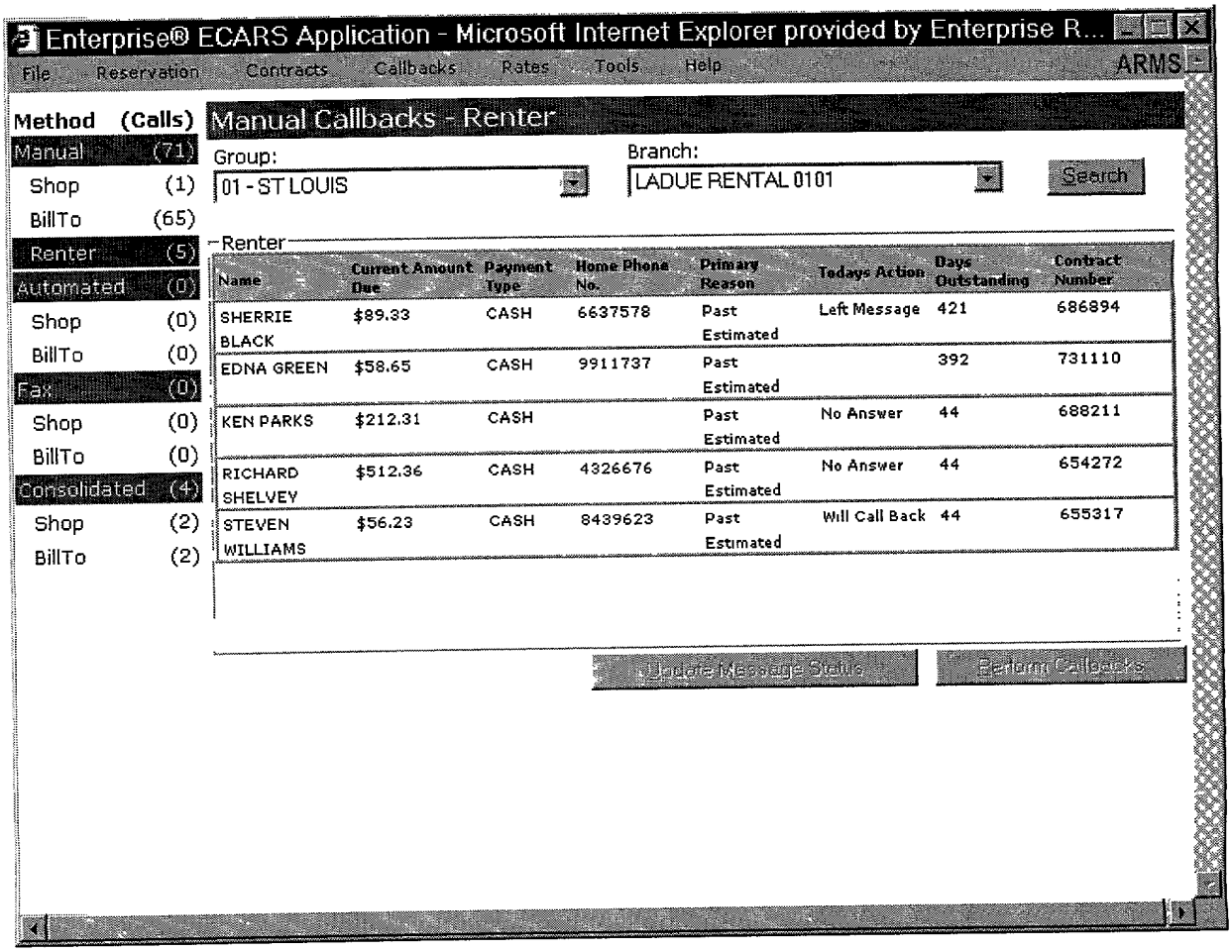

Figure 2: Renter Callback Summary screen.

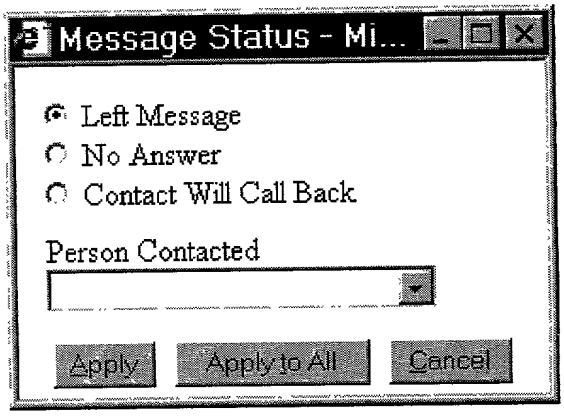

Figure 3: Message Status Dialog – Displayed when the Update Message Button is pressed

2.1 NavigationBar

2.1.1 Manual Total

2.1.1.1 Behavior

This output only field will display the total number of Manual Callbacks for selected Group Branch.

2.1.1.2 Validation

None specified at this time.

2.1.1.3 Business Exceptions

None specified at this time.

2.1.1.4 System Exceptions

None specified at this time.

2.1.2 ManualShopTotal

2.1.2.1 Behavior

This button will display the total number of Manual Shop Callbacks for the selected Group Branch. When this button is pressed, the Content Panels Account Table is refreshed to show data for Manual Shop callbacks for the selected Group Branch, and the renter and Contact Tables are cleared. Both the Perform Callbacks and Update Message Status buttons are visible, but disabled.

2.1.2.2 Validation

None specified at this time.

2.1.2.3 Business Exceptions

None specified at this time.

2.1.2.4 System Exceptions

None specified at this time.

2.1.3 ManualBillToTotal

2.1.3.1 Behavior

This button will display the total number of Manual Bill-To Callbacks for the selected Group Branch. When this button is pressed, the Content Panels Account Table is refreshed to show data for Manual Bill-To callbacks for the selected Group Branch, and the renter and Contact Tables are cleared. Both the Perform Callbacks and Update Message status buttons are visible, but disabled.

2.1.3.2 Validation

None specified at this time.

2.1.3.3 Business Exceptions

None specified at this time.

2.1.3.4 System Exceptions

None specified at this time.

2.1.4 ManualRenterTotal

2.1.4.1 Behavior

This button will display the total number of Manual Renter Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Renter Table is refreshed to show data for Manual Renter callbacks for the selected Group Branch. Only the Renter Table is visible and only the Perform Callbacks button is visible, but disabled.

2.1.4.2 Validation

None specified at this time.

2.1.4.3 Business Exceptions

None specified at this time.

2.1.4.4 System Exceptions

None specified at this time.

2.1.5 Automated Total

This output only field will display the total number of Automated Callbacks for the selected Group Branch.

2.1.5.1 Behavior

2.1.5.2 Validation

None specified at this time.

2.1.5.3 Business Exceptions

None specified at this time.

2.1.5.4 System Exceptions

None specified at this time.

2.1.6 AutomatedShopTotal

2.1.6.1 Behavior

This button will display the total number of Automated Shop Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Account Table is refreshed to show data for Automated Shop callbacks for the selected Group Branch, and the Renter and Contact Tables are cleared. Neither the Perform Callbacks nor the Update Message Status buttons are enabled.

2.1.6.2 Validation

None specified at this time.

2.1.6.3 Business Exceptions

None specified at this time.

2.1.6.4 System Exceptions

None specified at this time.

2.1.7 AutomatedBillToTotal

2.1.7.1 Behavior

This button will display the total number of Automated Bill-To Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Account Table is refreshed to show data for Automated Bill-To callbacks for the selected Group Branch, and the Renter and Contact Tables are cleared. Neither the Perform Callbacks nor the Update Message Status buttons are enabled.

2.1.7.2 Validation

None specified at this time.

2.1.7.3 Business Exceptions

None specified at this time.

2.1.7.4 System Exceptions

None specified at this time.

2.1.8 FaxTotal

2.1.8.1 Behavior

This output only field will display the total number of Fax Callbacks for the selected Group Branch.

2.1.8.2 Validation

None specified at this time.

2.1.8.3 Business Exceptions

None specified at this time.

2.1.8.4 System Exceptions

None specified at this time.

2.1.9 FaxShopTotal

2.1.9.1 Behavior

This button will display the total number of Fax Shop Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Account Table is refreshed to show data for Fax Shop callbacks for the selected Group Branch, and the Renter and Contact Tables are cleared. Neither the Perform Callbacks nor the Update Message Status buttons are enabled.

2.1.9.2 Validation

None specified at this time.

2.1.9.3 Business Exceptions

None specified at this time.

2.1.9.4 System Exceptions

None specified at this time.

2.1.10 FaxBillToTotal

2.1.10.1 Behavior

This button will display the total number of Automated Shop Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Account Table is refreshed to show data for Automated Shop callbacks for the selected Group Branch, and the Renter and Contact Tables are cleared. Neither the Perform Callbacks nor the Update Message Status buttons are enabled.

2.1.10.2 Validation

None specified at this time.

2.1.10.3 Business Exceptions

None specified at this time.

2.1.10.4 System Exceptions

None specified at this time.

2.1.11 ConsolodatedTotal

2.1.11.1 Behavior

This output only field will display the total number of Consolidated Callbacks for the selected Group Branch.

2.1.11.2 Validation

None specified at this time.

2.1.11.3 Business Exceptions

None specified at this time.

2.1.11.4 System Exceptions

None specified at this time.

2.1.12 ConsolodatedShopTotal

2.1.12.1 Behavior

This button will display the total number of Consolidated Shop Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Account Table is refreshed to show data for Consolidated Shop callbacks for the selected Group Branch, and the Renter and Contact Tables are cleared. Neither the Perform Callbacks nor the Update Message Status buttons are enabled.

2.1.12.2 Validation

None specified at this time.

2.1.12.3 Business Exceptions

None specified at this time.

2.1.12.4 System Exceptions

None specified at this time.

2.1.13 ConsolodatedBillToTotal

2.1.13.1 Behavior

This button will display the total number of Consolidated Bill-To Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Account Table is refreshed to show data for Consolidated Bill-To callbacks for the selected Group Branch, and the Renter and Contact Tables are cleared. Neither the Perform Callbacks nor the Update Message Status buttons are enabled.

2.1.13.2 Validation

None specified at this time.

2.1.13.3 Business Exceptions

None specified at this time.

2.1.13.4 System Exceptions

None specified at this time.

2.1.14 RMS Total

2.1.14.1 Behavior

This output only field will display the total number of RMS Callbacks for selected Group Branch.

2.1.14.2 Validation

This field is only displayed for an RMS employee.

2.1.14.3 Business Exceptions

None specified at this time.

2.1.14.4 System Exceptions

None specified at this time.

2.1.15 RMSShopTotal

2.1.15.1 Behavior

This button will display the total number of RMS Shop Callbacks for the selected Group Branch. When this button is pressed, the Content Panels Account Table is refreshed to show data for RMS Shop callbacks for the selected Group Branch, and the renter and Contact Tables are cleared. Both the Perform Callbacks and Update Message Status buttons are visible, but disabled.

2.1.15.2 Validation

This field is only displayed for an RMS employee.

2.1.15.3 Business Exceptions

None specified at this time.

2.1.15.4 System Exceptions

None specified at this time.

2.1.16 RMSBillToTotal

2.1.16.1 Behavior

This button will display the total number of RMS Bill-To Callbacks for the selected Group Branch. When this button is pressed, the Content Panels Account Table is refreshed to show data for RMS Bill-To callbacks for the selected Group Branch, and the renter and Contact Tables are cleared. Both the Perform Callbacks and Update Message status buttons are visible, but disabled.

2.1.16.2 Validation

This field is only displayed for an RMS employee.

2.1.16.3 Business Exceptions

None specified at this time.

2.1.16.4 System Exceptions

None specified at this time.

2.1.17 RMSRenterTotal

2.1.17.1 Behavior

This button will display the total number of RMS Renter Callbacks for the selected Group Branch. When this button is pressed, the Content Panel's Renter Table is refreshed to show data for RMS Renter callbacks for the selected Group Branch. Only the Renter Table is visible and only the Perform Callbacks button is visible, but disabled.

2.1.17.2 Validation

This field is only displayed for an RMS employee.

2.1.17.3 Business Exceptions

None specified at this time.

2.1.17.4 System Exceptions

None specified at this time.

2.1.18 Account Table

This table contains all accounts contained in all callbacks for the selected Group Branch and Callback Type. When an account is selected, the contacts table is loaded with all the contacts for that account that has a callback for that Group Branch and Callback Type. The Perform Callbacks Button is disabled.

2.1.18.1 Name

2.1.18.1.1 Behavior

This output only field contains the name of the account.

2.1.18.1.2 Validation

None specified at this time.

2.1.18.1.3 Business Exceptions

None specified at this time.

2.1.18.1.4 System Exceptions

None specified at this time.

2.1.18.2 Telephone Number

2.1.18.2.1 Behavior

This output only field contains the telephone number of the account.

2.1.18.2.2 Validation

None specified at this time.

2.1.18.2.3 Business Exceptions

None specified at this time.

2.1.18.2.4 System Exceptions

None specified at this time.

2.1.18.3 Number Of Calls

2.1.18.3.1 Behavior

This output only field contains the number of calls that particular account has for the selected Group, Branch, and Callback Type.

2.1.18.3.2 Validation

None specified at this time.

2.1.18.3.3 Business Exceptions

None specified at this time.

2.1.18.3.4 System Exceptions

None specified at this time.

2.1.18.4 Left Messages

2.1.18.4.1 Behavior

This output only field contains the number of messages left for that particular account for the selected Group, Branch, and Callback Type.

2.1.18.4.2 Validation

None specified at this time.

2.1.18.4.3 Business Exceptions

None specified at this time.

2.1.18.4.4 System Exceptions

None specified at this time.

2.1.18.5 Account No.

2.1.18.5.1 Behavior

This output only field contains the account number for the Account.

2.1.18.5.2 Validation

None specified at this time.

2.1.18.5.3 Business Exceptions

None specified at this time.

2.1.18.5.4 System Exceptions

None specified at this time.

2.1.18.6 Address

2.1.18.6.1 Behavior

This output only field contains the account's address.

2.1.18.6.2 Validation

None specified at this time.

2.1.18.6.3 Business Exceptions

None specified at this time.

2.1.18.6.4 System Exceptions

None specified at this time.

2.1.19 Contact Table

This table contains all contacts for the selected account contained in all callbacks for the selected Group Branch and Callback Type. When a contact is selected, the renter table is loaded with all the renter and contracts for that account and contact that has a callback for that Group Branch and Callback Type. The Perform Callbacks Button is disabled.

2.1.19.1 Name

2.1.19.1.1 Behavior

The name of the contact.

2.1.19.1.2 Validation

None specified at this time.

2.1.19.1.3 Business Exceptions

None specified at this time.

2.1.19.1.4 System Exceptions

None specified at this time.

2.1.19.2 Telephone Number

2.1.19.2.1 Behavior

The telephone number of the contact.

2.1.19.2.2 Validation

None specified at this time.

2.1.19.2.3 Business Exceptions

None specified at this time.

2.1.19.2.4 System Exceptions

None specified at this time.

2.1.19.3 Number Of Calls

2.1.19.3.1 Behavior

The number of calls for that Contact for the selected Group Branch and Callback Type.

2.1.19.3.2 Validation

None specified at this time.

2.1.19.3.3 Business Exceptions

None specified at this time.

2.1.19.3.4 System Exceptions

None specified at this time.

2.1.19.4 Left Messages

2.1.19.4.1 Behavior

The number of messages left for that contact for the selected Group Branch and Callback Type

2.1.19.4.2 Validation

None specified at this time.

2.1.19.4.3 Business Exceptions

None specified at this time.

2.1.19.4.4 System Exceptions

None specified at this time.

2.1.20 Renter Table

This table contains information about Renters, Contracts, and Callbacks for the selected Group, Branch, Account, Callback Type and Contact. Multiple Renters' can be selected. When one or more rows in the Renter table are selected, the Perform Callbacks button becomes enabled to perform a callback except for Automated, Fax, and Consolidated Callback Methods.

2.1.20.1 Name

2.1.20.1.1 Behavior

The name of the renter

2.1.20.1.2 Validation

None specified at this time.

2.1.20.1.3 Business Exceptions

None specified at this time.

2.1.20.1.4 System Exceptions

None specified at this time.

2.1.20.2 Vehicle

2.1.20.2.1 Behavior

The Year Make Model and Color of the Vehicle Rented? Or the Renter's Vehicle in the Shop?

2.1.20.2.2 Validation

None specified at this time.

2.1.20.2.3 Business Exceptions

None specified at this time.

2.1.20.2.4 System Exceptions

None specified at this time.

2.1.20.3 Claim/Pol/PO/RO

2.1.20.3.1 Behavior

The Claim Number, Policy Number, Purchase Order Number, or Repair Order Number.

2.1.20.3.2 Validation

None specified at this time.

2.1.20.3.3 Business Exceptions

None specified at this time.

2.1.20.3.4 System Exceptions

None specified at this time.

2.1.20.4 Date of Loss

2.1.20.4.1 Behavior

The date the renter's vehicle was damaged.

2.1.20.4.2 Validation

None specified at this time.

2.1.20.4.3 Business Exceptions

None specified at this time.

2.1.20.4.4 System Exceptions

None specified at this time.

2.1.20.5 Primary Reason

2.1.20.5.1 Behavior

The reason for the callback.

2.1.20.5.2 Validation

None specified at this time.

2.1.20.5.3 Business Exceptions

None specified at this time.

2.1.20.5.4 System Exceptions

None specified at this time.

2.1.20.6 Today's Action

2.1.20.6.1 Behavior

The action required for this callback.

2.1.20.6.2 Validation

None specified at this time.

2.1.20.6.3 Business Exceptions

None specified at this time.

2.1.20.6.4 System Exceptions

None specified at this time.

2.1.20.7 Days Outstanding

2.1.20.7.1 Behavior

The number of days since the date for which the callback was generated.

2.1.20.7.2 Validation

None specified at this time.

2.1.20.7.3 Business Exceptions

None specified at this time.

2.1.20.7.4 System Exceptions

None specified at this time.

2.1.20.8 Contract Number

2.1.20.8.1 Behavior

The contract number for the callback.

2.1.20.8.2 Validation

None specified at this time.

2.1.20.8.3 Business Exceptions

None specified at this time.

2.1.20.8.4 System Exceptions

None specified at this time.

2.2 Renter Content Panel

2.2.1 Group & Branch

See Group and Branch in the Bill-To and Shop Content Panel.

2.2.2 Renter Table

This table contains information about Renters, Contracts, and Callbacks for the selected Group, Branch, Account, Callback Type and Contact. Multiple Renters' can be selected. When one or more rows in the Renter table are selected, the Perform Callbacks button becomes enabled to perform a callback except for Automated, Fax, and Consolidated Callback Methods.

2.2.2.1 Name

The Renter's name.

2.2.2.1.1 Behavior

2.2.2.1.2 Validation

None specified at this time.

2.2.2.1.3 Business Exceptions

None specified at this time.

2.2.2.1.4 System Exceptions

None specified at this time.

2.2.2.2 Current Amount Due

2.2.2.2.1 Behavior

The amount owed by the renter.

2.2.2.2.2 Validation

None specified at this time.

2.2.2.2.3 Business Exceptions

None specified at this time.

2.2.2.2.4 System Exceptions

None specified at this time.

2.2.2.3 Payment Type

2.2.2.3.1 Behavior

The type of payment the renter used when picking up the vehicle.

2.2.2.3.2 Validation

None specified at this time.

2.2.2.3.3 Business Exceptions

None specified at this time.

2.2.2.3.4 System Exceptions

None specified at this time.

2.2.2.4 Home Phone Number

2.2.2.4.1 Behavior

The home phone number for the renter

2.2.2.4.2 Validation

None specified at this time.

2.2.2.4.3 Business Exceptions

None specified at this time.

2.2.2.4.4 System Exceptions

None specified at this time.

2.2.2.5 Primary Reason

2.2.2.5.1 Behavior

The reason for the callback.

2.2.2.5.2 Validation

None specified at this time.

2.2.2.5.3 Business Exceptions

None specified at this time.

2.2.2.5.4 System Exceptions

None specified at this time.

2.2.2.6 Today's Action

2.2.2.6.1 Behavior

The action required for today's callback.

2.2.2.6.2 Validation

None specified at this time.

2.2.2.6.3 Business Exceptions

None specified at this time.

2.2.2.6.4 System Exceptions

None specified at this time.

2.2.2.7 Days Outstanding

2.2.2.7.1 Behavior

The number of days since the date for which the callback was generated.

2.2.2.7.2 Validation

None specified at this time.

2.2.2.7.3 Business Exceptions

None specified at this time.

2.2.2.7.4 System Exceptions

None specified at this time.

2.2.2.8 Contract Number

2.2.2.8.1 Behavior

The contract number the callback is for.

2.2.2.8.2 Validation

None specified at this time.

2.2.2.8.3 Business Exceptions

None specified at this time.

2.2.2.8.4 System Exceptions

None specified at this time.

2.3 Message Status Dialog

This dialog is displayed when the Update Message Status button is pressed.

2.3.1 Left Message

2.3.1.1 Behavior

This button could be selected if a message was left regarding the selected callback.

2.3.1.2 Validation

None specified at this time.

2.3.1.3 Business Exceptions

None specified at this time.

2.3.1.4 System Exceptions

None specified at this time.

2.3.2 No Answer

2.3.2.1 Behavior

This button could be selected if an attempt was made for a callback but there was no answer.

2.3.2.2 Validation

None specified at this time.

2.3.2.3 Business Exceptions

None specified at this time.

2.3.2.4 System Exceptions

None specified at this time.

2.3.3 Contact will call back

2.3.3.1 Behavior

This button could be selected if someone was contacted and indicated that they will callback at a later time.

2.3.3.2 Validation

None specified at this time.

2.3.3.3 Business Exceptions

None specified at this time.

2.3.3.4 System Exceptions

None specified at this time.

2.3.4 Person Contacted

2.3.4.1 Behavior

The person who was contacted when a message was left.

2.3.4.2 Validation

None specified at this time.

2.3.4.3 Business Exceptions

None specified at this time.

2.3.4.4 System Exceptions

None specified at this time.

2.4 Rules

1. A user must be able to select any Branch within their Group for which to view Callbacks for the selected Branch.
2. Upon initial entry to Callback Summary the default Group and Branch will be for the requesting terminal's Group and Branch and the "Manual" Callback Method and "Shop" Callback Type will be selected on the Navigation Bar.
3. Callbacks must be grouped into Callback Methods to indicate how the user should perform the callback.
4. Callbacks must be grouped into Callback Types to indicate to whom the callback should be performed.
5. Applicable Callback Types should be listed under the Callback Methods that can be used to perform a callback of this type.
6. Shop Callbacks can be performed by the following Callback Methods:
   - Manual
   - Automated
   - Fax
   - Consolidated
7. Bill To Callbacks can be performed by the following Callback Methods:
   - Manual
   - Automated
   - Fax
   - Consolidated
8. Renter Callbacks can be performed by the following Callback Methods:
   - Manual
9. The user must be able to select a single Callback Type for a Callback Method and view all contracts associated with that selected Callback Type and method.
10. The total number of callbacks needing to be performed by a Callback Method, for a particular group/branch, should be displayed for each Callback Method.
11. The total number of callbacks needing to be performed to a particular Callback Type, for a particular group/branch, should be calculated and displayed for each Callback Type for each Callback Method.
12. The number of calls should only calculate the callbacks that are in an "incomplete" status for the particular Callback Method or the Callback Type under a Callback Method, for a particular group/branch.
13. The number of calls column should be re-calculated every time the user selects to refresh the data on the screen or leaves the window and returns back to the window so they can see their updates to the callbacks immediately.
14. When should the server go back to corporate when refreshing; every time a refresh is requested or only when a message has been sent from corporate that some event has occurred that affects the Callback summary list?
15. When the requesting terminal is from a Callback Center Group and Branch; those Callbacks that are consolidated to this Group and Branch should be grouped to the appropriate Callback Type under the "Manual" Callback Method.
16. When the requesting terminal is from a Renting Group and Branch; those Callbacks where the requesting Group and Branch is the owning Group/Branch for the Contract that has a Callback record, that are consolidated to

another Group and Branch should be grouped to the appropriate Callback Type under the "Consolidated" Callback Method.

2.5 Security

1. For security checks we will use the architecture security framework to determine if a user can access a reservation/contract based on their access levels.
2. We will need an application security check (separate from the security framework) for certain branches to determine if they can edit certain contracts, that are for a country other than theirs, for which they are responsible for performing the callbacks. (i.e. Canada branches may be responsible for Cars that are rented from a Florida branch but the Canada branch is required to do the callbacks for the Bill To account). The branch will need the ability to edit the contract regardless of how they select the contract. A solution may be to have a generic Kiosk Id, where the id allows editing of contracts across countries.

2.6 Questions

3. What happens when the user clicks on the Fax, Automated, or Consolidated buttons? Should we show the same content panel, or is there different information displayed for the other methods of callbacks.
4. Does the Update Message Status button belong to an entire account, a contact, or a particular callback? If it belongs to a particular callback (or set of selected callbacks) the Update Message Status button should be underneath the Renter Table. If it belongs to a particular contact, the Update Message Status button should be under the Contact table.
5. What is the formula for Days Outstanding?
6. What is the Vehicle in the Renter's table? Is it the Renter's Vehicle in the Shop? Is it the Rented Vehicle?

Addendum A

Supplementary Control Behavior

1. Expandable Table

1.1 Screen Shots

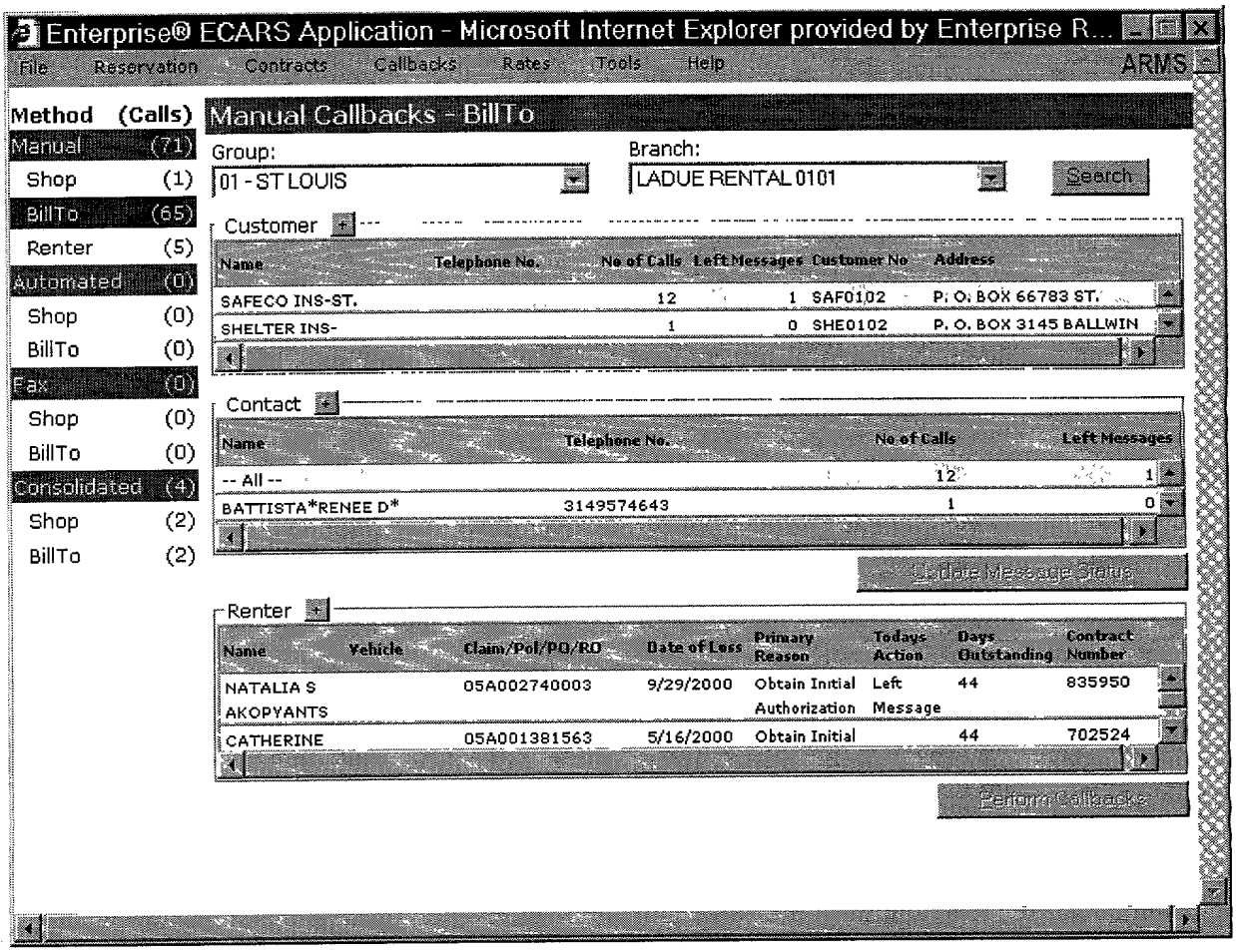

Figure 4: Callback Summary with the table's normal size.

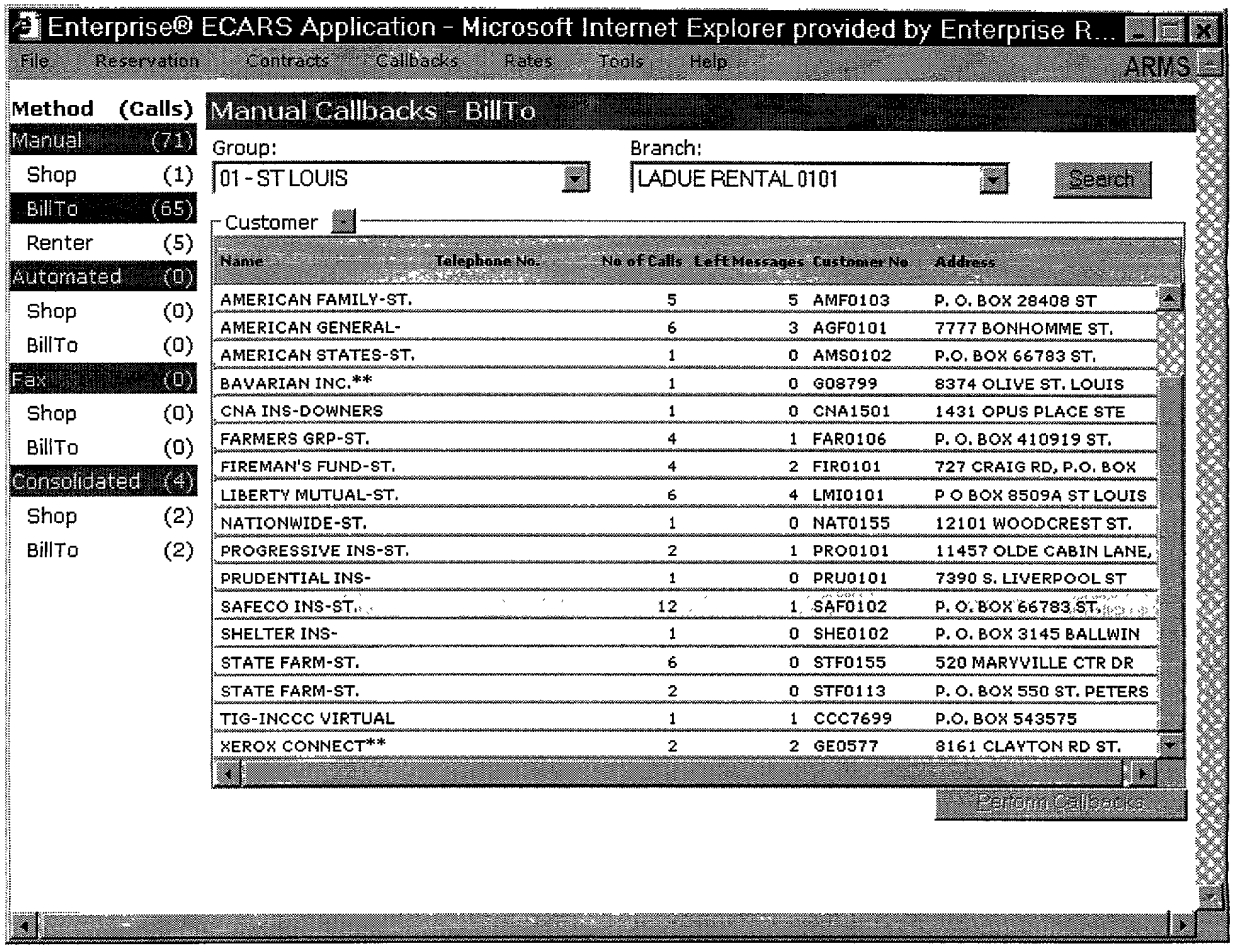

Figure 5: Callback Summary with the account table expanded.

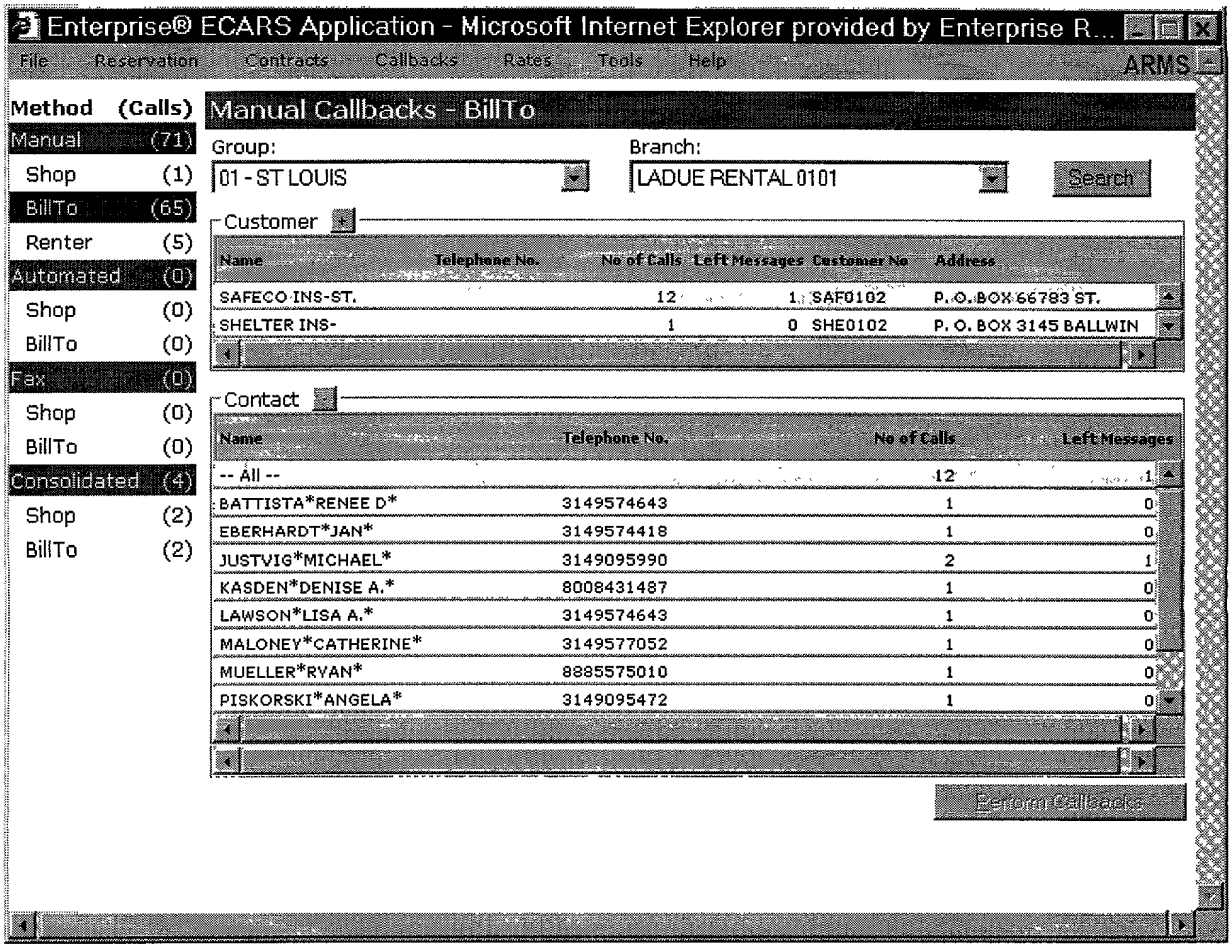

Figure 6: Callback Summary with the contact table expanded.

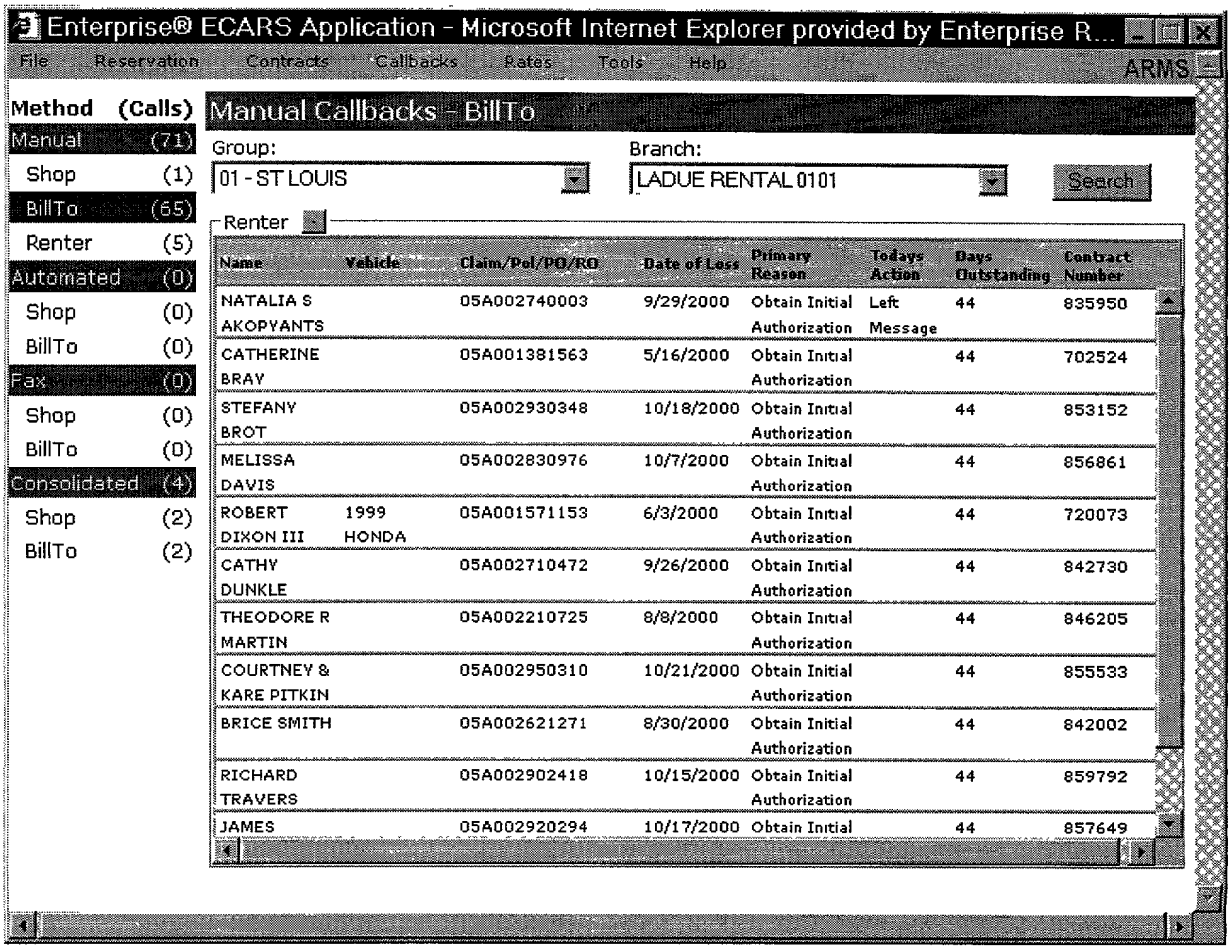

Figure 7: Callback Summary with the renter table expanded.

1.2 Behavior

1.2.1 Overview

The expandable table is used to give the user the option to see a longer list of data to select from or view. This is similar to the way a combo box works. When the user clicks the + button, the table expands as large as it can without loosing the vertical scroll bar. The table remains expanded until the user clicks the – button, or an item is selected. The expandable table should expand down if space is sufficient, however, it may expand up if there is no room below the table as in Figure 7.

<Company Name>

ECARS 2.0 - Customer Contact Synchronization Document

Revision History

Date	Version	Description	Author
08/09/2001	1.0	Created document	Johnny S. Johnston

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Contact Synchronization Document

1. Introduction

This document will describe the flow of the Customer Contact Synchronization between the GUI ECARS 2.0 system and the AS400 legacy system.

2. Contact Synchronizations Transaction Flow

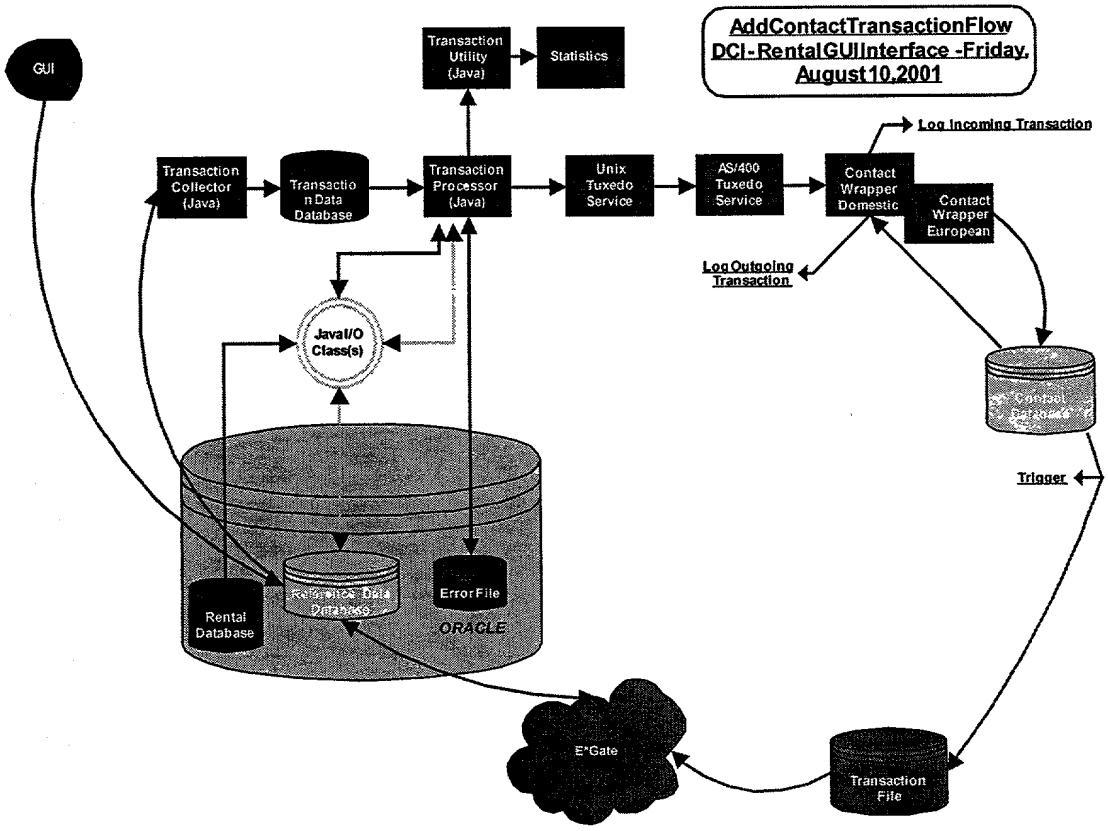

Figure 1 – Transaction Flow

Contact Synchronization Description:

After the Rental GUI system writes the reservation transaction to the Oracle database, it will initiate a Java object, DCI_ResClient, created by DCI, sending the reservation number and whether the transaction was an Add or Update.

DCI_ResClient will use Rental GUI's I/O class to retrieve and transform the reservation transaction data into the necessary input parameters.

The input parameters will be sent to a UNIX Tuxedo Service, ResService.

DCI_ResClient will also distribute the data to another Tuxedo Service, RESSRVR400, on the appropriate AS/400 machine.

A queueing mechanism will be used between the two Tuxedo services to manage transaction data.

RESSRVR400 will pass the input parameters to the wrapper program of the legacy reservation program, CCRS01.

Upon entering the wrapper program, the input parameters will be written to a transaction log file.

The wrapper program will perform edits based on business rules and update legacy reservation files on the AS/400.

When the reservation has been successfully written (a new legacy reservation number is created), the wrapper program will write a record to the Rental GUI/Legacy Reservation Number Cross-reference file.

When the wrapper program has completed processing, it will write the Input Parameters and any errors encountered to the transaction log file and return this data to RESSRVR400.

RESSRVR400 will return the Input Parameters and errors, if applicable, to ResService. It will write information regarding any errors to a log file on Oracle.

ERROR HANDLING:

Position 99 of the ERRORS field represents if the reservation transaction was written to the legacy file, RACBRMST, successfully.

It will return a value of '0' if the write failed and '1' if the write was successful. Position 1 – 98 of the ERRORS field represent error codes and the program that received it.

The ERRORS field is separated into 7 groups of error code (4 char) and program (10 char). The error codes reference error message descriptions found within the legacy reservation programs.

The error message descriptions can be accessed by a reference file on the AS/400 DEV machine.

Other information:

Unix to AS400 wrapper:

This module accepts contact data from the Tuxedo Service (UNIX), performs an appropriate data manipulation and passes it on to the contact RPG wrapper program.

Create Contact:

When called by Rental Redesign system, the Create Contact module accepts the required core contact data generated by a Rental Redesign create contact transaction.

The Create Contact module is called and validates the existence of the required data, if required data is not present, the module will generate error codes which will be logged on the AS/400.

If the required data is sent, the Create Contact module is passed to the *AAID01* wrapper program.
Only 1 transaction will be processed at a time. The Rental Transaction Location Group/Branch number must be sent to identify what machine a contact resides on.

When the unique contact id# limitation is reached, '999' will be assigned. The only issue this creates during Reservation is identifying a contact as 'Unknown' when the contact, in actuality, is known. For future, this will create an issue during Open Contract in that a contact id# other than '999. must be identified.

Contact Conversion:

Contact will be added and maintained from current state using owning group, legacy customer number, transactions source machine name, and contact adjustor source number (hccnno).

One record per group, customer number, source machine, and contact adjustor source number (hccnno) will exist in the new table.

Each contact will be assigned a new unique contact sequence number, seq_nbr.

It will be related to the oracle Cust_Mast via the new cust_seq_nbr

Logic:

Create/Add Transaction:

If Group, Legacy Customer Number, source machine, and source number (hccnno) exists ignore the transaction.

If Group, Legacy Customer Number, source machine, and source number (hccnno) does not exist, create the new Contact and assign a new contact seq_nbr.

Using a retrieve to the Oracle Cust_Mast by group and legacy customer number retrieve the new cust_seq_nbr.

Error processing needs to be established if referential integrity error is received.

Re-write or flag the transaction record so that it is processed again. The transaction record re-processing needs to be limited to a specific number of times so as not to cause an infinite loop. Kick out the transaction or log the data after the specified number of re-tries.

Update/Delete Contact Transaction:

Retrieve data using legacy group, legacy customer number, source machine name, source sequence number (hccnno)

Update contact information if it changes.

Delete a contact if it was deleted in legacy

Contact Data:

File DRHISC is updated continuously throughout the day. The only transactions we want to pass, for now, to rental are add's, deletes, and changes to contact name, status, or customer type. All other changes need not be sent to future state.

Rental Redesign/ECARS 2.0
Use Case Specification: Reservation Callback
Version <1.0>
Draft

Do not duplicate or distribute

Revision History

Date	Version	Description	Author
<dd/mmm/yy>	<x.x>	<details>	<name>
8/22/01	1.0	Initial Draft	Leah Moellman
8/24/01	1.1	Updates from John Hunt and Todd Van Dyke	Leah Moellman
8/28/01	1.2	Updates from internal review	Leah Moellman
8/29/01	1.3	Updates from user review, imported to Req Pro, Requirements marked	Leah Moellman
9/17/01	1.4	Updated proper info needs to be entered or callback indicator is disabled	L. Moellman

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Use Case Specification: Reservation Callback

1. Reservation Callback

1.1 Brief Description

This use case will describe how a user interacts with a system to create a callback flag from within a reservation window. It will show the flow of events that occur when a Callback Flag is created.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when the user has the option to create a callback from within a reservation window. The user has the option to create a callback for adjuster, service, body shop, or a renter callback. Callback flags can be accessed during the creation or update of a reservation .

2.1.2 The user chooses to create a callback flag for adjuster. If the user chooses service, body shop, or renter the use case continues at alternate flows (Service, Body shop, or Renter).

2.1.3 The system will display the following options to the user :

- Adjuster
- Service
- Body Shop
- Renter
- Comment (The user has the option to enter a comment that will appear in the Reservation only.)

2.1.4 The user elects to create an adjuster callback .

2.1.5 The system validates that the bill-to name and number is entered. If the bill-to information is missing the adjuster callback will be disabled and the use case continues at alternate flow (Missing Bill-To).

2.1.6 The user initiates the system to create an adjuster callback .

2.1.7 The system will create an adjuster callback, based on the created record for the reservation and the use case ends. (Note: Once the callback has been created, the **callback** can no longer be accessed through the reservation process. The callback flag will still appear with a visual indicator that the callback exists.)

2.2 Alternative Flows

2.3 Service Callback

2.3.1 The user chooses to create a service callback.

2.3.2 The system will display the following to the user :

- Adjuster
- Service
- Body Shop
- Renter
- Comment (The user has the option to enter a comment that will appear in the Reservation only.)

2.3.3 The user elects the service callback .

2.3.4 The system validates that the service name and number is entered . If the service information is missing the service callback will be disabled and the use case continues at alternate flow (Missing Shop).

2.3.5 The user initiates the system to create a service callback .

2.3.6 The system will create a service callback, based on the created record for the reservation and the use case ends. (Note: Once the callback has been created, the callback can no longer be accessed through the reservation process . The callback flag will still appear with a visual indicator that the callback exists .)

2.4 Body shop Callback

2.4.1 The user chooses to create a Body shop callback.

2.4.2 The system will display the following to the user :

- Adjuster
- Service
- Body Shop
- Renter
- Comment (The user has the option to enter a comment that will appear in the Reservation only.)

2.4.3 The user elects the body shop callback .

2.4.4 The system validates that the shop name and number is entered . If the shop information is missing the body shop callback will be disabled and the use case continues at alternate flow (Missing Shop).

2.4.5 The user initiates the system to create a body shop callback .

2.4.6 The system will create a body shop callback, based on the created record for the reservation and the use case ends. (Note: Once the callback has been created, the **callback** can no longer be accessed through the reservation process. The callback flag will still appear with a visual indicator that the callback exists.)

2.5 Renter Callback

2.5.1 The user chooses to create a renter callback.

2.5.2 The system will display the following to the user:

- Adjuster
- Service
- Body Shop
- Renter
- Comment (The user has the option to enter a comment that will appear in the Reservation only.)

2.5.3 The user elects the renter callback.

2.5.4 The system validates that the renter name is entered . If the renter name is missing the renter callback will be disabled and the use case continues at alternate flow (Missing Renter).

2.5.5 The user initiates the system to create a renter callback .

2.5.6 The system will create a renter callback, based on the created record for the reservation and the use case ends. (Note: Once the callback has been created, the **callback** can no longer be accessed through the reservation process. The callback flag will still appear with a visual indicator that the callback exists.)

2.6 Missing Bill-To

2.6.1 The system disables the adjuster callback and a note is always displayed as to why the callback is disabled.

2.6.2 The user acknowledges the message and the use case continues at 2.1.4 of the basic flow.

2.7 Missing Shop

2.7.1 The system disables the shop callback and a note is always displayed as to why the callback is disabled.

2.7.2 The user acknowledges the message and the use case continues at 2.3.3 of the alternate flow.

2.8 Missing Renter

2.8.1 The system disables the renter callback and a note is always displayed as to why the callback is disabled.

2.8.2 The user acknowledges the message and the use case continues at 2.5.1 of the alternate flow.

3. National Reservations

General Rule Sets

- The user cannot edit or create a callback for a Natres Reservation .

4. ARMS

- A call center or an insurance company creates the ARMS reservation through the ARMS system without a callback. The user has the option to create a callback for the reservation.
- The callback creation is treated like any other reservation.

5. Edit Note

General Rule Sets

- Deleting a callback cannot be done from the reservation.
- If the user wants to add a callback once the reservation is completed, the system goes through the same validations for edit as it did for create.
- The callback flag only has to be in options menu for editing a reservation.

6. Special Requirements-Callback Flag

General Rule Sets

1. When viewed through the legacy application, any of the items that have been checked in the GUI application will appear with an "X" for the corresponding value in the legacy application.
2. The user will have the ability to create a callback record in the same manner as the legacy system creates callback records.
3. Created callbacks will only be able to be viewed or worked at a callback center or a branch using the legacy application.
4. Callback flags can be accessed during the creation or update of a reservation .
5. The callback flag option must be in view for user during creation of a reservation.

7. International Requirements

- The callback functionality is the same for U.S., Germany, Ireland, UK and Canada.

8. Pre-Conditions

A user has successfully logged onto the computer.

9. Post-Conditions

10. Extension Points

11. Questions

1. Is there anything else needed internationally? *No*
2. Do we want the system to prompt the user to create a callback on every reservation or make it a manual option? *We want to force the user to see the option to create a callback when creating a reservation. When updating a current reservation, create a callback only needs to be an option.*
3. Should the user have the ability to remove an ARMS/RMS callback? *No, only a call center or insurance company should be able to remove this callback.*
4. Does wording need to be consistent with Legacy or GUI? *Leave fields as they are in Legacy. (Adj., Body shop, Service, Renter)*

ECARS 2.0
Screen Action Specification: Callback Flag

Version 1.4

Revision History

Date	Version	Description	Author
September 4, 2001	1.0	Creation	Leanne Bevelhimer
September 17, 2001	1.1	Updates after meeting with Jon and Mary	Leanne Bevelhimer
October 22, 2001	1.2	Updated to reflect proper name in the Options Drop Down	Leanne Bevelhimer
November 20, 2001	1.3	Updated to take out parenthesis reference	Leanne Waugh
November 28, 2001	1.4	Changed based on the defect that the system couldn't generate an error message	Leanne Waugh

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Screen Action Specification

1. Introduction

This document describes the behavioral characteristics associated with the Callback Flag screen, and its related screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Screen Shots

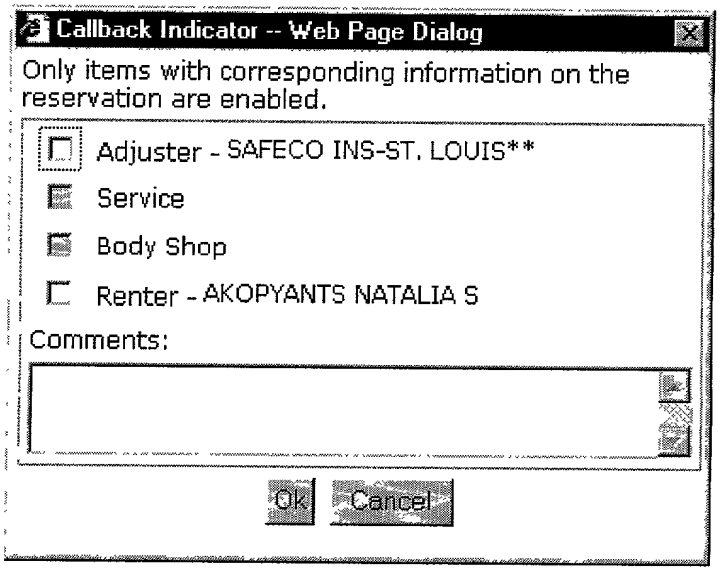

Figure 1: Callback Flag Pop-Up

3. Field Descriptions

3.1 Callback Flag Main Page

3.1.1 Warning Message Text Field

3.1.1.1 Behavior

This is a read-only, static text message to the user. It is providing information to the user regarding the usage of the screen. The text should read "Only items with corresponding information on the reservation are enabled.".

3.1.1.2 Validation

None identified at this time.

3.1.1.3 Business Exceptions

None identified at this time.

3.1.1.4 System Exceptions

None identified at this time.

3.1.2 Adjuster Checkbox

3.1.2.1 Behavior

This is a checkbox that allows the user to select an Adjuster Callback Flag. The user can check any number of the checkboxes at a given time. If an Adjuster Callback Flag was already selected for a reservation and that reservation was saved/completed, then the checkbox will be checked, but the field will be disabled. The user will not be able to unselect it.

If the user is not allowed to select an adjuster callback because there is not a bill-to entered, then the checkbox will be disabled.

3.1.2.2 Validation

This field is validated by not allowing the user to select it if the bill-to information is missing from the reservation. It is also validated by not allowing the user to unselect an adjuster callback from a previously completed reservation.

3.1.2.3 Business Exceptions

There must be a Bill-To associated with the Reservation before an Adjuster Callback Flag can be generated.

3.1.2.4 System Exceptions

If a Bill-To is not associated with the Reservation, then the user will not be able to select the Adjuster Flag.

3.1.3 Service Checkbox

3.1.3.1 Behavior

This is a checkbox that allows the user to select a Service Callback Flag. The user can check any number of the checkboxes at a given time. If an Service Callback Flag was already selected for a reservation and that reservation was saved/completed, then the checkbox will be checked, but the field will be disabled. The user will not be able to unselect it.

If the user is not allowed to select a service callback because there is not a shop entered, then the checkbox will be disabled.

3.1.3.2 Validation

This field is validated by not allowing the user to select it if the shop information is missing from the reservation. It is also validated by not allowing the user to unselect a service callback from a previously completed reservation .

3.1.3.3 Business Exceptions

There must be a Body Shop associated with the Reservation before a Service Callback Flag can be generated .

3.1.3.4 System Exceptions

If a Shop is not associated with the Reservation, then the user will not be able to select the Service Flag.

3.1.4 Body Shop Checkbox

3.1.4.1 Behavior

This is a checkbox that allows the user to select a Body Shop Callback Flag. The user can check any number of the checkboxes at a given time. If a Body Shop Callback Flag was already selected for a reservation and that reservation was saved/completed, then the checkbox will be checked, but the field will be disabled. The user will not be able to unselect it.

If the user is not allowed to select a body shop callback because there is not a shop entered, then the checkbox will

be disabled.

3.1.4.2 Validation

This field is validated by not allowing the user to select it if the shop information is missing from the reservation. It is also validated by not allowing the user to unselect a Body Shop callback from a previously completed reservation.

3.1.4.3 Business Exceptions

There must be a Body Shop associated with the Reservation before a Body Shop Callback Flag can be generated.

3.1.4.4 System Exceptions

If a Shop is not associated with the Reservation, then the user will not be able to select the Service Flag.

3.1.5 Renter Checkbox

3.1.5.1 Behavior

This is a checkbox that allows the user to select a Renter Callback Flag. The user can check any number of the checkboxes at a given time. If a Renter Callback Flag was already selected for a reservation and that reservation was saved/completed, then the checkbox will be checked, but the field will be disabled. The user will not be able to unselect it.

If the user is not allowed to select a Renter callback (because there is not a renter entered), then the checkbox will be disabled.

3.1.5.2 Validation

This field is validated by not allowing the user to select it if the renter information is missing from the reservation. It is also validated by not allowing the user to unselect a Renter callback from a previously completed reservation.

3.1.5.3 Business Exceptions

There must be a renter name associated with the Reservation before a Renter Callback Flag can be generated.

3.1.5.4 System Exceptions

If a Renter is not associated with the Reservation, then the user will not be able to select the Renter Flag.

3.1.6 Adjuster Information Text Field

3.1.6.1 Behavior

This is a read-only, static text message to the user. It provides information to the user regarding the information previously entered on the reservation screen. It will display the bill-to name that was entered on the bill-to panel of the reservation screen.

If no bill-to was entered, nothing will display.

3.1.6.2 Validation

None identified at this time.

3.1.6.3 Business Exceptions

None identified at this time.

3.1.6.4 System Exceptions

None identified at this time.

3.1.7 Service Information Text Field

3.1.7.1 Behavior

This is a read-only, static text message to the user. It provides information to the user regarding the information previously entered on the reservation screen. It will display the shop name that was entered on the vehicle/shop panel of the reservation screen.

If no shop was entered, nothing will display.

3.1.7.2 Validation

None identified at this time.

3.1.7.3 Business Exceptions

None identified at this time.

3.1.7.4 System Exceptions

None identified at this time.

3.1.8 Body Shop Information Text Field

3.1.8.1 Behavior

This is a read-only, static text message to the user. It provides information to the user regarding the information previously entered on the reservation screen. It will display the shop name that was entered on the vehicle/shop panel of the reservation screen.

If no shop was entered, nothing will display.

3.1.8.2 Validation

None identified at this time.

3.1.8.3 Business Exceptions

None identified at this time.

3.1.8.4 System Exceptions

None identified at this time.

3.1.9 Renter Information Text Field

3.1.9.1 Behavior

This is a read-only, static text message to the user. It provides information to the user regarding the information previously entered on the reservation screen. It will display the renter name that was entered on the driver panel of the reservation screen. It will be displayed in the format of last name, first name.

If no renter was entered, nothing will display.

3.1.9.2 Validation

None identified at this time.

3.1.9.3 Business Exceptions

None identified at this time.

3.1.9.4 System Exceptions

None identified at this time.

3.1.10 Comment Text Box

3.1.10.1 Behavior

This is a free-form text field that allows the user to enter reservation comments about the callback flags that are selected. These notes appear only on this screen. They do not appear in the callback section of legacy .

3.1.10.2 Validation

None identified at this time.

3.1.10.3 Business Exceptions

None identified at this time.

3.1.10.4 System Exceptions

None identified at this time.

3.1.11 OK Button

3.1.11.1 Behavior

When the user presses the 'OK' button, the system saves the callback flag and notes that the user has entered and closes the callback flag screen.

The user is permitted to press the 'OK' button and have no items checked.

If the Callback Flag screen is navigated to by virtue of the user completing the reservation, after the user presses the 'OK' button and the information is validated, the reservation completion process continues.

3.1.11.2 Validation

When the user presses the 'OK' button, the system validates the Adjuster, Body Shop and Service data to insure that the appropriate information (Bill-To or Body Shop) is already contained within the reservation.

3.1.11.3 Business Exceptions

The user cannot save an adjuster callback flag if the Bill-To information is not in the reservation. The user cannot save a Body Shop or Service callback flag if the Body Shop information is not in the reservation .

3.1.11.4 System Exceptions

Due to the way that the screen works with the disabling of invalid options, there should not be the case of the user checking an invalid flag. However, if the flags do not validate, the system will alert the user and return him/her to the callback flag screen.

3.1.12 Cancel Button

3.1.12.1 Behavior

When the user presses the 'Cancel' button, the system closes the Callback Flag screen.

If the Callback Flag screen is navigated to by virtue of the user completing the reservation, when the user presses the 'Cancel' button the complete reservation process is cancelled and the Callback Flag window is closed .

3.1.12.2 Validation

None identified at this time.

3.1.12.3 Business Exceptions

None identified at this time.

3.1.12.4 System Exceptions

None identified at this time.

4. Rules

- Callback Flag data is only saved to the reservation if all the changes to the reservations are saved.
- The user has the option to add/edit callback flags to any reservation in his/her group .
- This screen will not be available for NatRes Reservations.
- The screen will appear to the user when he/she starts the completion process of a new reservation and from the 'Reservation Callback' option in the 'Options' drop down menu in the title bar.
- If the user has selected a callback and then edited other reservation information that invalidates the callback, the system will not save that particular callback flag. The user will not be notified of this.

5. Security

- The security for Callback Flag is based upon the Reservation security model. If the user has permissions to edit a reservation, he/she will be able to add/edit callback flags. In general, all users in a group can modify all reservations for that group.

6. Questions

<Company Name>

Bill-to
Screen Action Specification

Revision History

Date	Version	Description	Author
04/12/2001	0.0	Created Template	Marty Tichy
08/06/2001	1.0	Created Document	Maribeth Concannon
08/30/2001	1.1	Updated to reflect changes from Navigation use case.	James Atteberry
10/03/2001	1.2	Added screen shot for Account Search – Reservation Pilot version	James Atteberry
10/08/2001	1.3	Replaced Account Search screen shots with the versions that do not have print buttons.	Chris Carr

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Bill to screen used in Reservation and Open.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Screen Prints

2.1 Main Screen

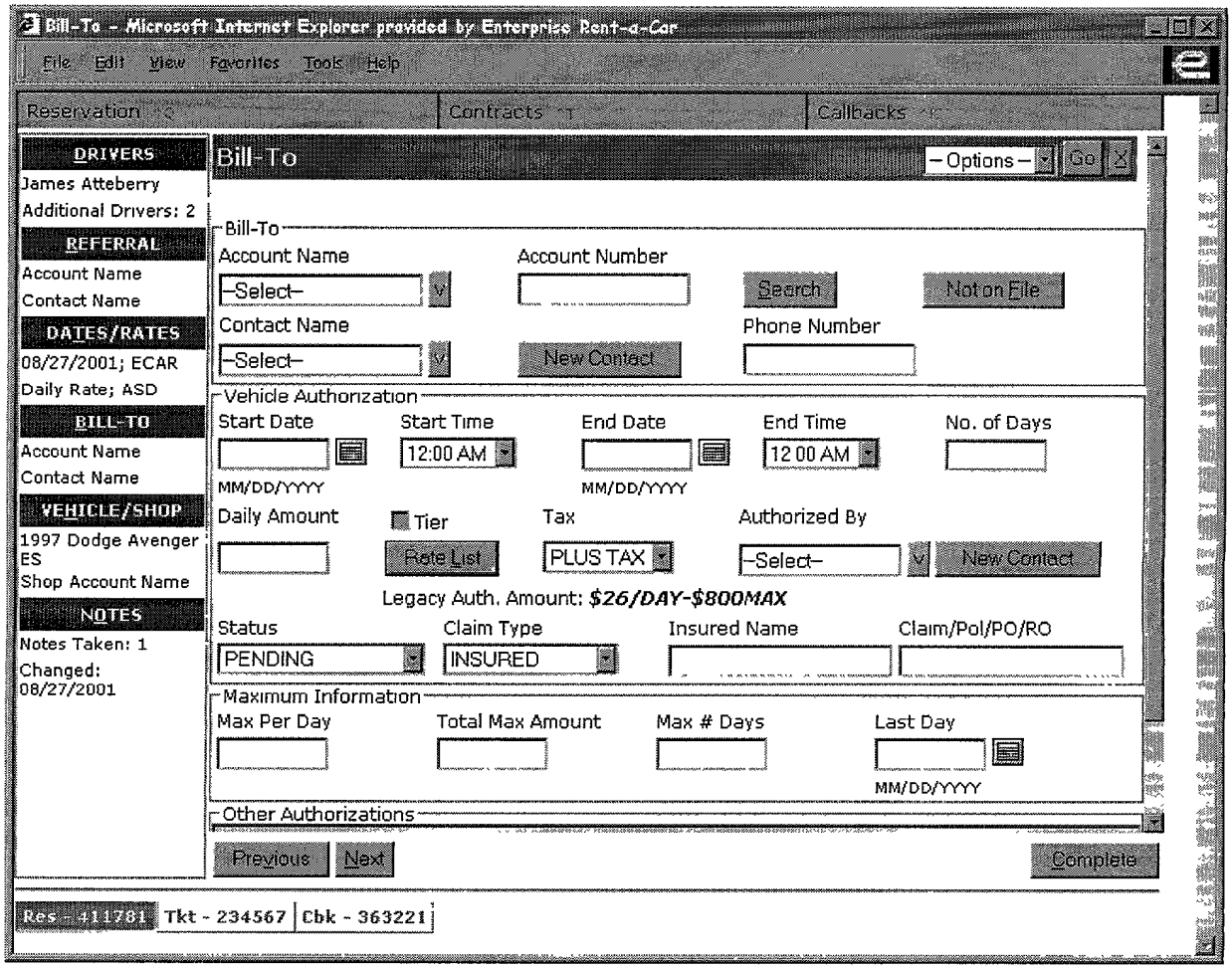

Figure 1 - Bill-To main screen

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2.2 Account Search

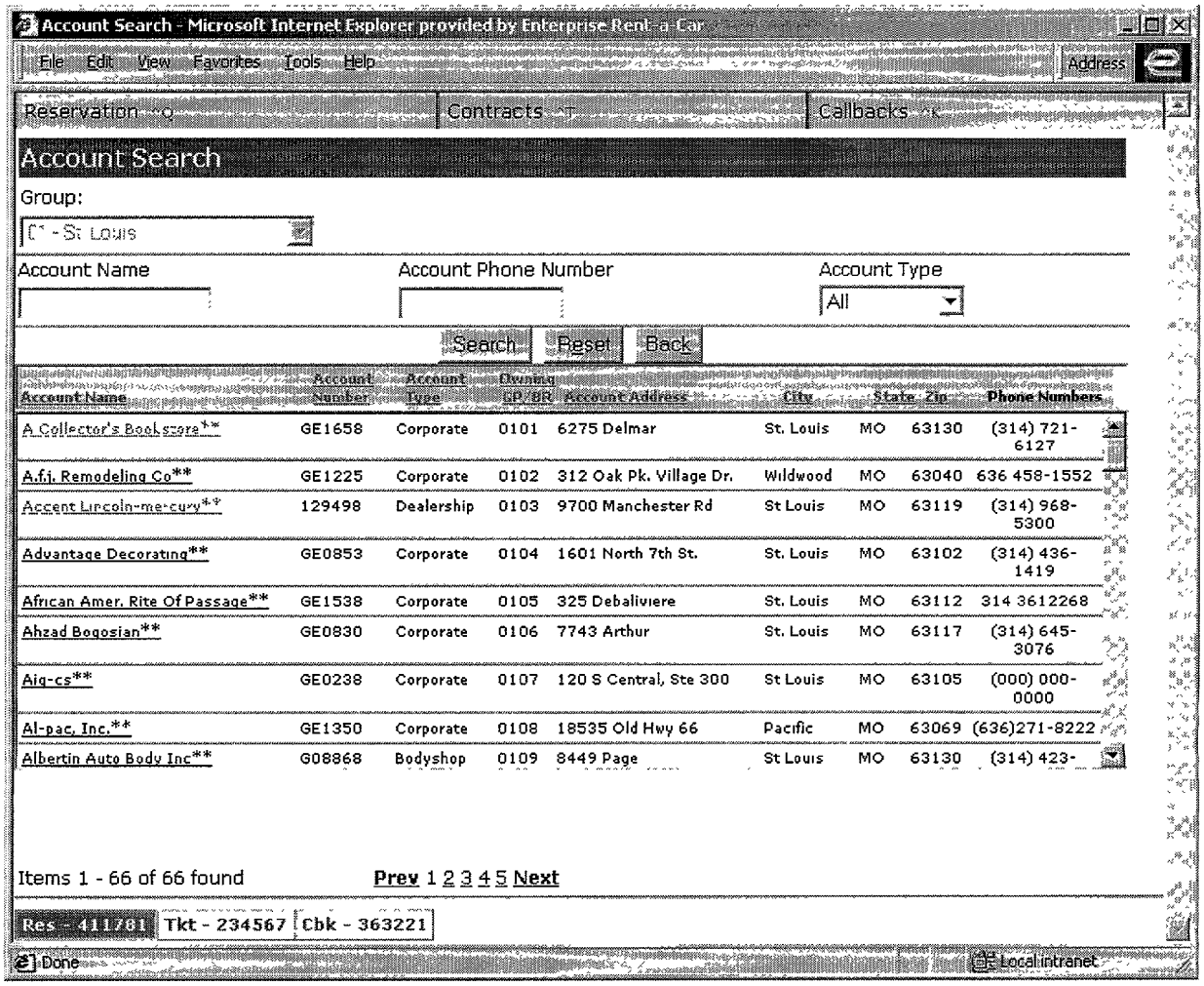

Figure 2 - Account Search (Open Ticket version)

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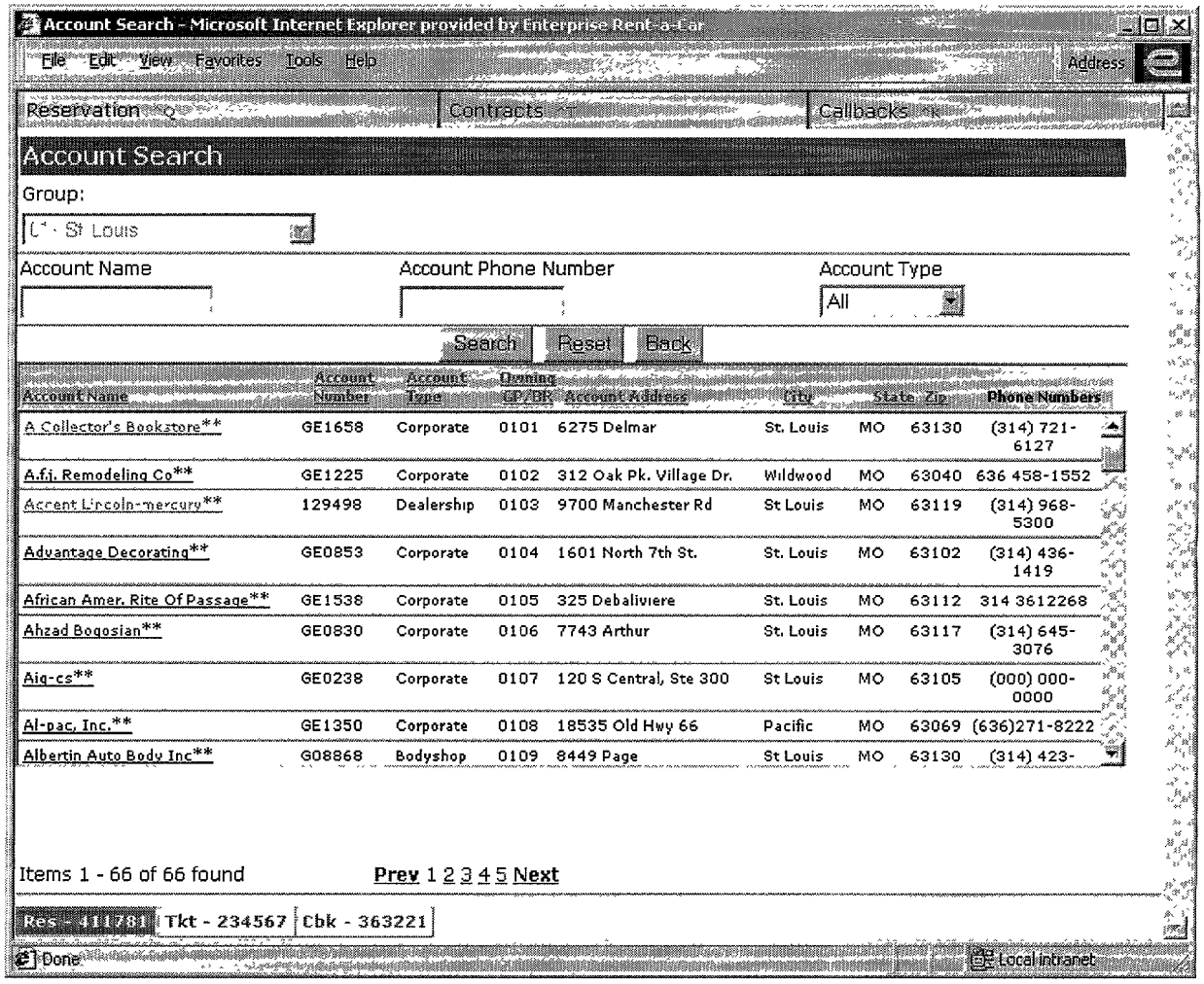

Figure 3 - Account Search (Res Pilot version)

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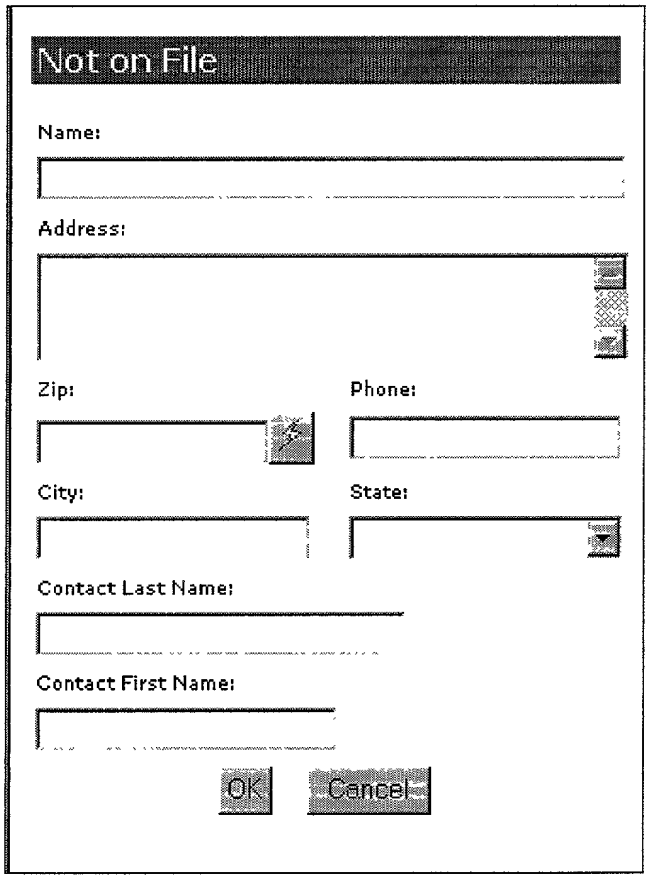
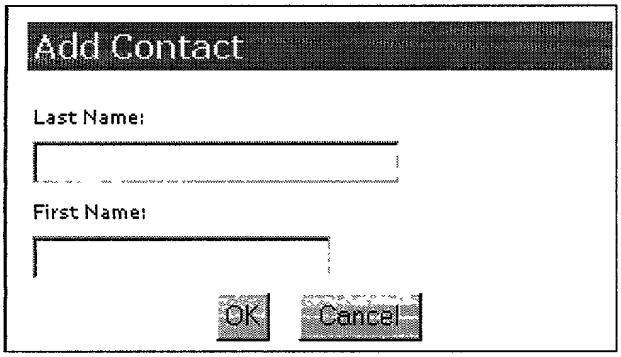
2.3 Not on File



2.4 Add Contact



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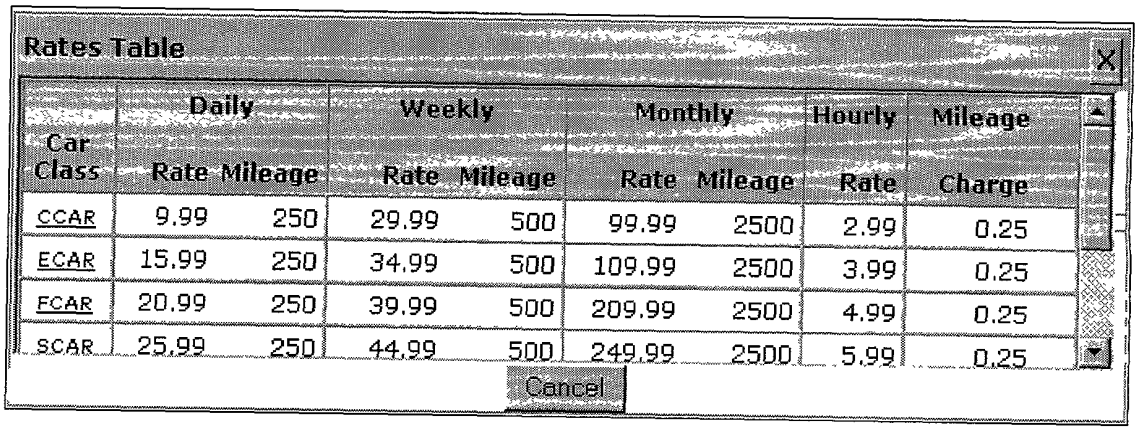
2.5 Rates Table



3. Reservation Number

3.1 SUPLpending1.pending2 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 SUPLpending1.pending5 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message. See error message supplemental spec for exact text.

3.4 System Exceptions

None identified at this time.

4. Bill-to Title Bar Area

4.1 Behavior

The option area in the bill-to Title Bar will allow the user to access transaction-wide functions. These functions for Reservation are: -- Options --, Print, Void and Transfer. The default option is "—Options – ". The user must press the Go button to initiate the selected function.

The Title bar Button area contains two buttons – a Go button and a Close button.

The Go button s always active, and is used to initiate a function selected in the Options area. If the selected option is "—Options –" (the default), nothing should happen.

The Close button is always active and is used to close the current transaction. The button is labeled with an 'X'. Pressing this button will cause a confirmation popup to appear, asking the user if they wish to cancel the transaction and lose all changes. If the user selects 'No', they are returned to the Bill-to screen. If the user selects 'Yes', the transaction is closed with no changes saved to the database.

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4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Button Line Area

5.1 Behavior

The Previous button will take the user to the Dates/Rates screen within the same transaction.

The Next button will take the user to the Vehicle/Shop screen within the same transaction.

The Complete button will initiate a save of the transaction. All validations will be performed, returning any errors to the user. If there are no errors, the transaction is saved, and the user is returned to the Reservation home page.

5.2 Validation

None identified at this time.

5.3 Business Exceptions

None identified at this time.

5.4 System Exceptions

None identified at this time.

6. Bill-to

6.1 Account Name

This is a drop down which displays the "branch short list" of Account Names when the user hits the button beside it. Or, if the user begins to type anything in the field, a drop down will automatically appear and continue to position to the name most closely matching what has been typed.

Drop down. If the user selects an account not authorized to bill ("Source only") then the system presents message and user can make another selection or clear the field and use "Not on File."

6.1.1 Business Exceptions

None.

6.1.2 System Exceptions

None.

6.2 Account Number

If the user has selected a name from the drop-down, the corresponding number should appear here.

Alternatively, the user can enter an Account number in this field.

Validation of the value in the field is performed when the user selects the "Search" button.

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If the number isn't a valid account, then the system provides a message. If it is valid, but not billable, then the user can make another selection or clear the field and use "Not on File."

6.2.1 *Business Exceptions*

None.

6.2.2 *System Exceptions*

None.

6.3 "Search" button

If this button is used when an account number is in the "Account Number" field, then it validates the account number.

If not account number is present, then the "Account Search" screen is displayed.

In the first scenario above, if the account is not valid, a message is displayed. (See Referral Source for up-to-date functionality.)

6.3.1 *Business Exceptions*

None.

6.3.2 *System Exceptions*

None.

6.4 "Not on File" Button

Takes the user a screen to add a bill-to. This should also blank out the Account name and the Account number.

Upon returning from the panel, the name should be in the Account Name field and the Account Number should be blank.

6.4.1 *Validation*

None.

6.4.2 *Business Exceptions*

None.

6.4.3 *System Exceptions*

None.

6.5 Contact Name

This is a drop-down based on the account name selected above.

If not account name is selected, then the drop-down should be blank.

6.5.1 *Business Exceptions*

None.

6.5.2 *System Exceptions*

None.

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6.6 "New Contact" Button

This allows the user to add a contact to an account in the event that the name they're looking for is not present in the drop-down.

This pulls up a panel for the user to enter the first and or last name.

6.6.1 Validation

None.

6.6.2 Business Exceptions

None.

6.6.3 System Exceptions

None.

6.7 Phone Number

The user may add or update a number for the contact selected. This number is only saved on the contract.

Standard phone number formatting.

6.7.1 Business Exceptions

None.

6.7.2 System Exceptions

None.

6.8 Overall behavior

Once an account is selected (either by drop-down or by entering the number manually, the "Bill-to X" hyperlink is changed to the name of the account.

As a bill-to is added, the next "Bill-to X" is added to the list across the top, so as to allow the user to add another Bill-to. The maximum number of Bill-tos is four. *This functionality will not be available for Reservation Pilot since only one bill-to is allowed.*

7. Vehicle Authorization

7.1.1 Behavior

The start date should default to the open date and time of the ticket (either real for an open ticket, or projected, in the case of a reservation).

7.1.2 Validation

Standard date formatting.

Must be a date within the range of pickup date and return date.

Requires a status of "Authorized"

7.1.3 Business Exceptions

None.

7.1.4 System Exceptions

None.

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7.2 Start Date Button

7.2.1 Behavior

Displays calendar for date selection

7.2.2 Validation

Standard date calendar.

7.2.3 Business Exceptions

None.

7.2.4 System Exceptions

None.

7.3 Start Time

7.3.1 Behavior

If the ticket or reservation is 24 billing cycle, then the value defaults to the p/up time (if available) If no pickup time is available, the default value is 'blank'.

7.3.2 Validation

This field is only valid for 24 hour billing. If the ticket is calendar day billing, the drop down should not work. If 24h billing, then the values are 15 minute increments around the clock.

7.3.3 Business Exceptions

None.

7.3.4 System Exceptions

None.

7.4 End Date

7.4.1 Behavior

The end date should default blank .

7.4.2 Validation

Standard date formatting.

Must be a date which is equal to or after the Start Date.

Requires a status of "Authorized"

7.4.3 Business Exceptions

None.

7.4.4 System Exceptions

None.

7.5 End Date Button

7.5.1 Behavior

Displays calendar for date selection

7.5.2 *Validation*

Standard date calendar .

7.5.3 *Business Exceptions*

None.

7.5.4 *System Exceptions*

None.

7.6 End Time

7.6.1 *Behavior*

If the ticket or reservation is 24 billing cycle, then the value defaults to the same value as the start time

7.6.2 *Validation*

This field is only valid for 24 hour billing. If the ticket is calendar day billing, the drop down should not work. If 24h billing, then the values are 15 minute increments around the clock.

7.6.3 *Business Exceptions*

None.

7.6.4 *System Exceptions*

None.

7.7 No. of Days

7.7.1 *Behavior*

If the start date and end date are completed, this should be filled with the number of days authorized.

7.7.2 *Validation*

Valid values are 0 and any integer.

If the user skips end date, the system will determine the date using this value in association with the start date.

7.7.3 *Business Exceptions*

None.

7.7.4 *System Exceptions*

None.

7.8 Daily Amount vs. Total Charges Toggle

7.8.1 *Behavior*

User selects one or the other.

If total charges, then leave daily amount field and tax field blank.

If the user elects to add information in to the daily amount field or the tax field and the "Total Charges" are selected, the system should change the toggle to the Daily Amount.

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7.8.2 *Validation*

If daily (along with authorized status = "authorized"), then authorized amount, tax and authorized by are required.

If total charges (along with authorized status = "authorized"), then authorized by is required.

******NOTE 4.8 will not be for Reservation Pilot. The users will not have the ability to choose total charges.

7.8.3 *Business Exceptions*

None.

7.8.4 *System Exceptions*

None.

7.9 Daily Amount Field

7.9.1 *Behavior*

If this field is changed by the user, the system should ensure that the toggle for "Daily Authorization" is selected.

This field can be filled in by the user, or by the "Rate List Button"

7.9.2 *Validation*

Alpha numeric

7.9.3 *Business Exceptions*

None.

7.9.4 *System Exceptions*

None.

7.10 Rate List Button

7.10.1 *Behavior*

Takes the user to a screen to pick a car class from the "Rates Table". The car class and all associated rates for the ticket are saved in the ticket, although it doesn't show on the screen. If the rate that is retrieved is tiered, then the rate from the first tier is put in the daily amount field and the tier flag is checked.

7.10.2 *Validation*

If the bill-to does not have negotiated rates in the system, this button will return nothing.

7.10.3 *Business Exceptions*

None.

7.10.4 *System Exceptions*

None.

7.11 Tier Flag

7.11.1 *Behavior*

System updated based on the criteria listed in the Rate List Button behavior.

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7.11.2 Validation

None.

7.11.3 Business Exceptions

None.

7.11.4 System Exceptions

None.

7.12 Tax

7.12.1 Behavior

Drop down to indicate either "included" or "plus tax". Should default to "included."

7.12.2 Validation

This field is required with a daily authorization when the status is "authorized."

7.12.3 Business Exceptions

None.

7.12.4 System Exceptions

None.

7.13 Authorized By

7.13.1 Behavior

Drop down of all of the contacts for the bill-to. See Contact name.

7.13.2 Validation

Authorized by is required when the authorization status is "Authorized"

7.13.3 Business Exceptions

None.

7.13.4 System Exceptions

None.

7.14 "New Contact" Contact Button

See New Contact from Bill-to.

7.15 Output field for Green Screen ECARS Max Amount Field

7.15.1 Behavior

This is an output field that displays the information from the Max Amount Field in the Reservation / Open Ticket.

It cannot be updated by the user.

Anytime the contract is saved, this field is updated with the values from the Daily Amount concatenated with the Total Max Amount and saved to legacy that way. If both of those fields are blank, then no update is made.

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7.15.2 Validation

None

7.15.3 Business Exceptions

None

7.15.4 System Exceptions

None

7.16 Status

7.16.1 Behavior

The default value is 'blank'.

The user can select one of the following: Authorized, Pending, Declined, Terminated, and Reimbursement.

7.16.2 Validation

If the user selects Authorized, then some fields in the authorization information box are required. See those fields for those notes.

7.16.3 Business Exceptions

None.

7.16.4 System Exceptions

None.

7.17 Claim Type

7.17.1 Behavior

Drop-down. The user can select from among "Insured, Claimant, or Theft. (Equivalent values will be determined for each country.)

Default to "blank".

7.17.2 Validation

This field is required when the rental type is "Insurance".

7.17.3 Business Exceptions

None.

7.17.4 System Exceptions

None.

7.18 Insured Name

7.18.1 Behavior

This is a text field.

7.18.2 Validation

Optional.

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The bill-to account may require that information be captured in this field (AASI02), but it is only required at the time of close. The account may, however, require that any information in the field be in a particular format. This is to be enforced during Reservation, Open and Close.

7.18.3 Business Exceptions

None.

7.18.4 System Exceptions

None.

7.19 Claim/Pol/PO/RO#

7.19.1 Behavior

This is a text field.

7.19.2 Validation

Optional.

The bill-to account may require that information be captured in this field (AASI02), but it is only required at the time of close. The account may, however, require that any information in the field be in a particular format. This is to be enforced during Reservation, Open and Close.

7.19.3 Business Exceptions

None.

7.19.4 System Exceptions

None.

8. Maximum Information

8.1 Overall behavior

8.2 Max Per Day

8.2.1 Behavior

This is a numeric field which must support the local currency formatting.

8.2.2 Validation

This field is not required.

8.2.3 Business Exceptions

None.

8.2.4 System Exceptions

None.

8.3 Total Max Amount

8.3.1 Behavior

This is a numeric field which must support the local currency formatting.

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8.3.2 *Validation*

This field is not required.

8.3.3 *Business Exceptions*

None.

8.3.4 *System Exceptions*

None.

8.4 Max # Days

8.4.1 *Behavior*

This is a numeric field which must support integers.

8.4.2 *Validation*

This field is not required.

8.4.3 *Business Exceptions*

None.

8.4.4 *System Exceptions*

None.

8.5 Last Day

8.5.1 *Behavior*

This is a date field.

8.5.2 *Validation*

This field is not required.

8.5.3 *Business Exceptions*

None.

8.5.4 *System Exceptions*

None.

8.6 "Last Day" Calendar button

8.6.1 *Behavior*

Displays calendar for date selection

8.6.2 *Validation*

Standard date calendar.

8.6.3 *Business Exceptions*

None.

8.6.4 *System Exceptions*

None.

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9. Other Authorizations

9.1 Overall behavior

This section will be omitted from Reservation Pilot. It will only be incorporated once the Perot system has been integrated.

9.2 Item

9.2.1 Behavior

Drop-down to select from the products available at the renting branch.

9.2.2 Validation

None.

9.2.3 Business Exceptions

None.

9.2.4 System Exceptions

None.

9.3 Start Date

9.3.1 Behavior

The first date which is authorized to bill for the item. This should default to the start date in the Authorization Information above.

9.3.2 Validation

Standard date formatting.

Must be a date within the range of pickup date and return date.

Requires a status of "Authorized"

9.3.3 Business Exceptions

None.

9.3.4 System Exceptions

None.

9.4 End Date

9.4.1 Behavior

The end date should default to the end date of the authorization above. Provided that it is the same, when the end date of the "master authorization" is changed, the end date should change for each item with a matching end date.

9.4.2 Validation

Standard date formatting.

Must be a date which is equal to or after the Start Date for the item authorized.

Requires a status of "Authorized"

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9.4.3 *Business Exceptions*

None.

9.4.4 *System Exceptions*

None.

9.5 Amount

9.5.1 *Behavior*

Text field.

9.5.2 *Validation*

None.

9.5.3 *Business Exceptions*

None.

9.5.4 *System Exceptions*

None.

9.6 Tax

9.6.1 *Behavior*

Drop down to indicate either "included" or "plus tax". Should default to "included."

9.6.2 *Validation*

Required for each row where an item is selected.

9.6.3 *Business Exceptions*

None.

9.6.4 *System Exceptions*

None.

10. Account Search Screen

10.1 Overall Note

This screen is called from the Bill-to screen. These notes are intended to highlight to overall functionality, but may not reflect the most up-to-date changes. See the use case and screen spec for Search for the most accurate information.

10.2 Group

10.2.1 *Behavior*

This is a drop-down to limit the scope of the search. For Reservation Pilot, this drop down will not be enabled. It will be set to the Physical Terminal's physical location and the user will not be able to change it.

10.2.2 *Validation*

Any group present in the drop down is valid for search.

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10.2.3 Business Exceptions

None.

10.2.4 System Exceptions

None.

10.3 Account Name

10.3.1 Behavior

The information in the text field is used in association with the "Account Phone Number" and "Account Type" to limit the scope of the search.

10.3.2 Validation

The field is optional.

The field defaults to blank.

10.3.3 Business Exceptions

None.

10.3.4 System Exceptions

None.

10.4 Account Phone Number

10.4.1 Behavior

The information in the text field is used in association with the "Account Name" and "Account Type" to limit the scope of the search.

10.4.2 Validation

The field is optional.

The field defaults to blank.

10.4.3 Business Exceptions

None.

10.4.4 System Exceptions

None.

10.5 Account Type

10.5.1 Behavior

Drop down.

The information is used in association with the "Account Phone Number" and "Account Name" to limit the scope of the search.

10.5.2 Validation

The field is optional.

The field defaults to "All".

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10.5.3 Business Exceptions

None.

10.5.4 System Exceptions

None.

10.6 Search Button

10.6.1 Behavior

Executes the search using the criteria entered above.

10.6.2 Validation

None.

10.6.3 Business Exceptions

None.

10.6.4 System Exceptions

None.

10.7 Reset Button

10.7.1 Behavior

Clears the screen of the previous search (if applicable) and clears the "Account Name", "Account Phone Number", and "Account Type" fields.

10.7.2 Validation

None.

10.7.3 Business Exceptions

None.

10.7.4 System Exceptions

None.

10.8 Cancel Button

10.8.1 Behavior

Returns to the screen from which the search was called. No account name or number is returned.

10.8.2 Validation

None.

10.8.3 Business Exceptions

None.

10.8.4 System Exceptions

None.

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10.9 Print Current Page

10.9.1 Behavior

Prints the list of accounts found and shown on the screen.

10.9.2 Validation

None.

10.9.3 Business Exceptions

None.

10.9.4 System Exceptions

None.

10.10 Print Current Page

10.10.1 Behavior

Prints the list of all accounts found that match the given criteria.

10.10.2 Validation

None.

10.10.3 Business Exceptions

None.

10.10.4 System Exceptions

None.

10.11 Page Numbers (Hyperlinks)

10.11.1 Behavior

Positions the list to the page selected, or to the "Previous" or "Next" page, if selected.

10.11.2 Validation

These should not be hyperlinks, if no more than one page of Accounts were returned. (i.e. If only one page of accounts is displayed, then the "Prev", "Next" will display on either side of the number "1", and none of them will be hyperlinks.)

10.11.3 Business Exceptions

None.

10.11.4 System Exceptions

None.

11. Not on File

11.1 Note

International considerations have not yet been made.

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11.2 Name

11.2.1 Behavior

Text field to enter the name of the company.

11.2.2 Validation

This field is required.

11.2.3 Business Exceptions

None.

11.2.4 System Exceptions

None.

11.3 Address

11.3.1 Behavior

Text field to enter the company's address.

11.3.2 Validation

All address formatting rules apply. This field is required.

11.3.3 Business Exceptions

None.

11.3.4 System Exceptions

None.

11.4 Zip

11.4.1 Behavior

Text field to enter the company's zip code.

11.4.2 Validation

All address formatting rules apply. This field is required. The zip code can be entered and then the user can use the button behind the field to search for the City and State information. Complies with standard address formatting, etc…

11.4.3 Business Exceptions

None.

11.4.4 System Exceptions

None.

11.5 Phone

11.5.1 Behavior

Text field to enter the company's phone number.

11.5.2 Validation

All phone number formatting rules apply. This field is required .

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11.5.3 Business Exceptions

None.

11.5.4 System Exceptions

None.

11.6 City

11.6.1 Behavior

Text field to enter the company's city.

11.6.2 Validation

All address formatting rules apply. This field is required.

11.6.3 Business Exceptions

None.

11.6.4 System Exceptions

None.

11.7 State

11.7.1 Behavior

Drop-down field to enter the company's state.

11.7.2 Validation

All address formatting rules apply. This field is required.

11.7.3 Business Exceptions

None.

11.7.4 System Exceptions

None.

11.8 Contact Last Name

11.8.1 Behavior

Text field to enter an individual's last name.

11.8.2 Validation

This field is required.

11.8.3 Business Exceptions

None.

11.8.4 System Exceptions

None.

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11.9 Contact First Name

11.9.1 Behavior

Text field to enter an individual's first name.

11.9.2 Validation

This field is required.

11.9.3 Business Exceptions

None.

11.9.4 System Exceptions

None.

12. Add Contact

12.1 Last Name

12.1.1 Behavior

Text field to enter an individual's last name.

12.1.2 Validation

Either of the two fields is required.

12.1.3 Business Exceptions

None.

12.1.4 System Exceptions

None.

12.2 First Name

12.2.1 Behavior

Text field to enter an individual's first name.

12.2.2 Validation

Either of the two fields is required.

12.2.3 Business Exceptions

None.

12.2.4 System Exceptions

None.

13. Rates Table

13.1.1 Behavior

This table displays the car classes and rates for the bill-to account. For display purposes, international considerations for tiered rates have not yet been taken into account, although the functionality is described in the "Rate List Button" text above.

The user can select an amount / car class to be authorized by clicking a car class.

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13.1.2 Validation

None.

13.1.3 Business Exceptions

None.

13.1.4 System Exceptions

None.

14. Rules

14.1 Tabbing

Tabbing between fields should be in the order that they are in this document.

15. Security

The user must have the appropriate security level to access this screen.

16. System Generated Notes Table (as of 6 August, 2001)

	Note Text	When to generate in Reservation	When to generate in Open	Use Case/S
rvation becomes an open ticket e reservation has already been	"Ticket Opened"		Create	Open
ticket is opened, the information reference field will be generated as	Any text within the preference field		Create	Open
ticket is opened, the text in the hicle notes, will be generated as a	Text in the field "Vehicle Notes"		Create	Open
vation is matched or unmatched to	Reservation # "XXXXXX" was (un) matched to Ticket # "XXXXXX".		Create/Edit	Open
vation is created	"Reservation Created"	Create		Create
r marks the ARMS Status Dialog 'Renter Has Been Contacted"	"Renter Has Been Contacted" AND any text entered in the ARMS Notes field	Edit		Navigation/ Dialog B
r marks the ARMS Status Dialog 'Renter Has Not Been Contacted"	"Renter Has Been Contacted" AND any text entered in the ARMS Notes field	Edit		Navigation/ Dialog B
ervation Pick-up date is changed	Pick-up Date "XX/XX/XXXX" was changed to "XX/XX/XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
ervation Pick-up time is changed	Pick-up Time "XX: XX" was changed to "XX: XX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
ervation pick-up method is	Pick-up Method "XX" was changed to "XX".	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
ervation pick-up location is	Pick-up Location "XXXX" was changed to "XXXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
ervation Return date is changed	Return Date "XX/XX/XXXX" was changed to "XX/XX/XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
ervation Return time is changed	Return Time "XX: XX" was changed to "XX: XX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
ervation return method is changed	Return Method "XX" was changed to "XX".	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
Source and/or Account Number ged	Rate Source "XXXXX" was changed to "XXXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
Type is changed	Rate Type "XXXX" was changed to "XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da
Class is changed	Car Class "XXXX" was changed to "XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Da

	Note Text	When to generate in Reservation	When to generate in Open	Use Case/S
rate source and car class has been the user manually changes any of es populated in the vehicle rate	What rate values were changed and what the old and new values are.	Create/Edit	Create/Edit	Rates/Da
servation return location is changed	Return Location "XXXX" was changed to "XXXXX"	Edit	Create (if selected in the Reservation) /Edit	Pick-u Locatio
oup or Branch of the Reservation location is changed	Pick-up Location "GPBR" was changed to "GPBR"	Edit	Create (if selected in the Reservation) /Edit	Pick-u Locatio
oup or Branch of the Reservation ocation is changed	Return Location "GPBR" was changed to "GPBR"	Edit	Create (if selected in the Reservation) /Edit	Pick-u Locatio
tem has populated the products er a rate source has been chosen user manually changes any of the	What values were changed and what the old and new values are.	Create/Edit	Create/Edit	Products Discoun
r changes a tax or surcharge.	What values were changed and what the old and new values are.	Create/Edit	Create/Edit	Tax
r changes the tax-exempt status.	Tax Exempt Status "XXXX" was changed to "XXXX".	Create/Edit	Create/Edit	Tax/Dri
r chooses to "Rent" when a renter p "Renter Warning"	"Renter Warning overridden"	Create/Edit	Create/Edit	Basic Res/D
r chooses to bypass the warning driver's age is either over 70. 21--20 years of age.	"Underage/Overage warning overridden"	Create/Edit	Create/Edit	Basic Res/D
r changes any phone number of r or an additional driver.	What Values were changed and what the old and new values are.	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/D
r changes any renter or additional first or last name	What values were changed and what the old and new values are	Create/Edit	Create/Edit	Basic Res/D
adds or deletes an additional	Driver "Last Name, First Name" was removed	Create/Edit	Create (if data exists from the reservation) /Edit	Basic Res/D
changes the Referral Account	Referral Account "XXXXX" was changed to "XXXXXX"	Edit	Create (if data exists from the reservation) /Edit	Referra
changes the referral contact. rral account is the same)	Referral Contact "XXXX" was changed to "XXXX" for Referral Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Referra
adds a "not on file" contact	Not on File Contact "First Name, Last Name" was added for Referral Account "XXXXX".	Create/Edit	Create/Edit	Referra
changes the bill-to account.	Bill-to "XXXX" was changed to "XXXX".	Edit	Create (if data exists from the reservation) /Edit	Bill-to
changes the bill-to contact. (The count is the same)	Bill-To Contact "XXXXX" was changed to "XXXX" for Bill-to account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to

	Note Text	When to generate in Reservation	When to generate in Open	Use Case/S
r adds a "not of file" bill-to .	Not on file contact "First Name Last Name" was added for Bill-to Account "XXXXX"	Create/Edit	Create/Edit	Bill-T
r changes the authorized by (The Bill-to account is the same)	Authorized By "XXXX" was changed to "XXXX" for Bill-to Account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes the auth status. (The account is the same)	The Authorization Status was changed from "XXX" to "XXXX" for Bill-to account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes the auth %. (The Bill-to is the same)	The Authorization % was changed from "XX" to "XX" for Bill-to Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes the Max Per day. (The account is the same)	The Maximum Amount Per Day was changed from "XX" to "XX" for Bill-to Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes the Max Billable t (The Bill-to account is the same)	The Maximum Billable Amount was changed from "XX" to "XX" for Bill-to Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes the number of days. ll-to account is the same)	The number of days was changed from "XX" to "XX" for Bill-to Account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes either the Billing start billing start time (The Bill-to is the same)	The Billing Start Date and Billing Start Time changed from "XXXXXX" to "XXXXXXXX' for Bill-to Account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes either the Billing end billing end time. (The Bill-to is the same)	The Billing End Date and Billing End Time changed from "XXXXXX" to "XXXXXXXX' for Bill-to account "XXXXX".	Edit	Create (if data exists from the reservation) /Edit	Bill-to
r changes the daily rate. (The Bill-nt is the same)	The Daily Rate was changed from "XXXX" to "XXXX" for Bill-to account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
changes the Authorized Car The Bill-to is the same)	The Authorized Car Class was changed from "XXXX" to "XXXX" for Bill-to account "XXXXX".	Edit	Create (if data exists from the reservation) /Edit	Bill-to
changes the Plus Tax check box l-to account is the same)	What the check box was and what it was changed to	Edit	Create (if data exists from the reservation) /Edit	Bill-to
changes a product or service (The the same)	What Products were added or deleted and the amounts they were changed from and to.	Create/Edit	Create/Edit	Bill-to
adds a Not on File Bill-to	Not on File Account "XXXX" has been added as a Bill-to	Create/Edit	Create/Edit	Bill-to
changes the Ro/Po/Cl #. (The the same)	The Claim/Pol/PO/RO was changed from "XXXXX" to "XXXX" for Bill-to account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
changes the Claim type. (The the same)	The Claim Type was changed from "XXXX" to "XXXX" for Bill-to account "XXXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to

	Note Text	When to generate in Reservation	When to generate in Open	Use Case/S
r changes the insured's name.	The Insured's Name was changed from "XXXXXX" to "XXXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to

<Company Name>

<ECARS 2.0 Reservation>
Use Case Specification: <Basic Reservation>

Version <1.0>

Revision History

Date	Version	Description	Author
<05/25/2001>	<1.1>	<Initial draft>	<J. Gaines>
05/31/2001		Eliminate DL requirements for res. Distinguish difference between state issue validation and issuing authority validation. Break down age soft edit further.	J. Gaines
6/4/2001		Put DL requirements back in. Imported into Req Pro	J. Gaines
9/7/2001		Updated wording on Phone Number and sorting on Phone Number. Changed Account Search to Search.	L. Moellman
10/10/2001	1.5	Removed requirements related to the Save and Continue functionality. This functionality has been removed from the application.	James Atteberry
11/14/2001	1.6	Added additional driver validation on page submit that additional driver last name was entered	J. Gaines

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Use Case Specification: <Basic Reservation>

1. Basic Reservation

1.1 Brief Description

The use case describes the interaction between the user and the system when a renter calls and the user captures renter and additional driver information.

2. Flow of Events

2.1 Basic Flow

2.1.1 The system displays renter information fields to be completed by the user. The following is the list of fields to be completed by the user:

Most commonly entered information (North America):

- Last Name
- First Name
- Hm Phone
- Wk Phone
- Extension
- Other Phone
- Phone Description

Less commonly entered information (North America):

- Address
- Zip
- Country
- City
- State
- Other Address
- Employer
- License Number
- Expiration Date
- Country Issued
- State Issued
- DOB (Date of Birth)
- SSN
- Height – Feet
- Height - Inches
- Weight
- Hair Color
- Eye Color

Note: Primary payment method is part of the above list but will not be implemented until E2.

Most commonly entered information (U.K.):

- Last Name
- First Name
- Hm Phone

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- Wk Phone
- Extension
- Other Phone
- Phone Description

Less commonly entered information (U.K.):

- Address (A 2nd renter address field is added in U.K.)
- Postal Code
- Country
- City
- County
- Other Address
- Employer
- Licence Number (note difference in spelling)
- Expiration Date
- Issuing Authority
- DOB (Date of Birth)
- National ID (Social Security Number in US)
- Height – Feet (NOT CAPTURED IN U.K, Germany, Ireland.)
- Height – Inches (NOT CAPTURED IN U.K., Germany, Ireland)
- Weight (NOT CAPTURED IN U.K., Germany, Ireland)
- Hair Color (NOT CAPTURED IN U.K, Germany, Ireland.)
- Eye Color (NOT CAPTURED IN U.K., Germany, Ireland)

tNote: Primary Payment Method (note: "check" is spelled "cheque") is part of the above list but will not be implemented until E2.

2.1.2 Renter has the option of initiating any of the following options:

(NOTE: These options are in order of most frequently chosen options to least frequently chosen options)

- Enter data for above listed fields
- Add a Referral Source
- Quote a rate
- Add a pick up/return date and time.
- Add a car class
- Special and discounts
- Add Directions
- Add Notes
- Add Additional drivers
- Insurance Detail
- Cash Qualification
- Print the reservation

(Note: These options are covered in the alternative flows.)

2.1.3 The user enters the above identified renter information into the reservation.

2.1.4 The user has the option to "Complete Reservation" or Cancel. If the user chooses to Exit the reservation the use case continues at alternative flow (Cancel).

2.1.5 The system validates the information entered, as determined by the business rules:

- If the driver's license is expired, the use case continues at alternative flow (Driver's License Expiration date).

- If the age for DOB entered is over 70, the use case continues at alternative flow (Over Age Restriction).
- If the age for DOB is 18-20, the use case continues at alternative flow (Under Age 18-20 Soft Edit Restriction).
- If the age for DOB is 21-24, the use case continues at alternative flow (Under Age 21-24 Soft Edit Restriction).
- If the age for the DOB entered is under 18, the use case continues at alternative flow (Under Age Rental Restriction).
- If all of the driver's license related fields are not entered along with the driver's license number, the use case continues at alternate flow (Drivers License requirements).
- If the user has not captured the minimum required information of Last Name, the use case continues at alternative Flow (Incomplete Reservation)
- If any additional driver has a warning attached to it's file in the repeat renter database, the use case extends to the alternative flow (Renter Warning) in the Create Reservation use case and then the Renter use case continues.

2.1.6 The use case ends.

2.2 Alternative Flows

2.2.1 Drivers License Requirements

2.2.1.1 If the user enters a driver's license number, the following required information must also be entered; otherwise the system displays an error message that additional information is needed:

- Driver's license expiration date
- State issued
- Date of birth

2.2.1.2 If the user enters any of the driver's license information other than the driver's license number and does not enter the driver's license number the system will display an error message that additional information is needed.

2.2.1.3 If the user enters any of the non-required driver's license information (SSN, height, weight, eye color, or hair color) without also entering the required driver's license information, the system will not display an error message that additional information is needed and the use case continues.

2.2.2 Add Additional Drivers

2.2.2.1 The system displays the area for entry of the first and last name information of the additional driver. The fields in this area are:

Name:

- First Name
- Last Name

Address:

- Street Address
- Zip/Postal Code
- Country

- City
- State/Province

Phone Number:

- Home Phone Number
- Work Phone Number (and extension)
- Other Phone Number (and phone type)

Driver's License:

- Driver's License Number
- Driver's License Expiration Date
- State Issued/Issuing Authority
- Date of Birth
- Social Security Number
- Height
- Weight
- Hair Color
- Eye Color

2.2.2.2 The user enters the first and last name of the additional driver and the home phone number.

2.2.2.3 The system displays the option for the user to select that the additional driver has the same address information as the renter. If the user selects this option continue at (2.2.4.6) in this alternate flow.

2.2.2.4 The user enters the street address and zip/postal code.

2.2.2.5 Based upon the zip/postal code search the system produces the city and state/province, populates the corresponding fields and continues at the next step in the basic flow. The system also makes the information in these fields available for edit. If the search produces no matching city and state/province information the use case continues at alternate flow (No Match to Zip/Postal Code).

2.2.2.6 The user enters additional driver information from the table above (2.2.5.1)

2.2.2.7 The system displays the option for the user to:

- Add more additional drivers. (The system allows the user to enter up to 5 additional drivers to the reservation)
- Delete additional driver information
- Exit and return to the basic flow.

2.2.2.8 If the user selects to add more additional drivers (up to 6), the system adds another blank additional driver area and returns to the first step of this alternate flow. If the user selects to exit the use case returns to the point in the basic flow where the user selected to add the additional driver information.

2.2.2.9 Upon submitting the additional driver page, the system validates that the minimum reservation criteria (Additional Driver's Last Name) has been entered. **Note this validation works as it does with the primary driver last name validation

If the user has not captured the minimum required information of Last Name, the use case continues at alternative Flow (Incomplete Reservation)

2.2.3 No Match to Zip/Postal Code

2.2.3.1 The system displays a feedback message that the entered zip/postal code and selected country do not produce matching city and state/province information.

2.2.3.2 The user has the option to:

- Change the zip/postal code and country information and repopulate.
- Continue with the reservation process without the city and state/province information.

2.2.3.3 If the user selects to change the zip/postal code the use case will continue at (..) in the basic flow. If the user elects to continue with the reservation process, the system will allow the user to manually enter information into the city and state/province fields and continue at ( ) in the basic flow. The system will have the already entered information present and ready for the user to enter the city and to select the state/province.

(Note on Address Search Results):

Based upon the zip/postal code search the system produces the city and state/province, populates the corresponding fields and continues at the next step in the basic flow. The system also makes the information in these fields available for edit.

2.2.4 Multiple Matches to Zip/Postal Code

2.2.4.1 The system displays a message that more than one city matches the zip/postal code entered and displays the list of matching cities to the user.

2.2.4.2 The user has the option to select one of the cities from the list or cancel and continue with the reservation.

2.2.5 Expired Driver's License

2.2.5.1 The system displays a feedback message "Drivers License is Expired".

2.2.5.2 The system prompts the user to:

- Change/enter valid expiration date.
- Cancel.

2.2.5.3 If the user selects to change the expiration date the use case proceeds back to Phone and Driver's License Information Entry in the basic flow. If the user selects to exit the reservation, the use case continues at alternate flow (Cancel).

2.2.6 Over Age Soft Edit Restriction

2.2.6.1 The system determines that the age of the renter is 70 years old or older.

2.2.6.2 The system displays a feedback message that the entered date of birth results in the age of the renter being 70 or older. The system also displays the entered date of birth and the renter's age.

2.2.6.3 The system prompts the user to:

- Continue with reservation.
- Enter correct date of birth.
- Cancel.

2.2.6.4 If the user elects to continue with the reservation, the use case continues at (2.1.7) in the basic flow. If the user selects to change the date of birth the use case continues at (2.1.3) in the basic

flow with the attention placed on the DOB field. If the user selects to exit the reservation, the use case continues at alternate flow (Cancel).

2.2.7 Under Age (18-20) Soft Edit Restriction

2.2.7.1 The system determines that the age of the renter is 18 to 20 years old.

2.2.7.2 The system displays a feedback message that the entered date of birth results in the age of the renter being 18 to 20 years old. The system also displays the entered date of birth and the renter's age.

2.2.7.3 The system prompts the user to:

- Continue with reservation.
- Enter correct date of birth.
- Cancel.

2.2.7.4 If the user elects to continue with the reservation, the use case continues at (2.1.7) in the basic flow. If the user selects to change the date of birth the use case continues at (2.1.3) in the basic flow with attention placed on the DOB field. If the user selects to exit the reservation, the use case continues at alternate flow (Cancel).

2.2.8 Under Age (21-24) Soft Edit Restriction

2.2.8.1 The system determines that the age of the renter is 21 to 24 years old.

2.2.8.2 The system displays a feedback message that the entered date of birth results in the age of the renter being 21 to 24 years old. The system also displays the entered date of birth and the renter's age.

2.2.8.3 The system prompts the user to:

- Continue with reservation.
- Enter correct date of birth.
- Cancel.

2.2.8.4 If the user elects to continue with the reservation, the use case continues at (2.1.7) in the basic flow. If the user selects to change the date of birth the use case continues at (2.1.3) in the basic flow with attention placed on the DOB field . If the user selects to exit the reservation, the use case continues at alternate flow (Cancel).

2.2.9 Under Age Hard Edit Restriction

2.2.9.1 The system determines that the age of the renter is equal to or under the age of 17 years old and Do Not Rent.

2.2.9.2 The system displays a feedback message that the entered date of birth results in the age of the renter being under the age restriction. The system also displays the entered date of birth and the renter's age.

2.2.9.3 The system prompts the user to:

- Correct the date of birth.
- Cancel.

2.2.9.4 If the user selects to change the date of birth the use case continues at (2.1.3) in the basic flow with attention placed on the DOB field. If the user selects to exit the reservation, the use case

continues at alternate flow (Cancel).

2.2.10 Incomplete Reservation

2.2.10.1 The system displays a message notifying that the user has not captured the minimum required information necessary (Renter's Last Name) to create a reservation.

(Note: The user cannot move the message box to the side and attempt to navigate any area on the screen to enter required information. They must click "OK" to dismiss the message box and enter the required information.)

2.2.11 Print

2.2.11.1 The Renter Call Reservation Use Case initiates the Print use case

2.2.12 Cancel

2.2.12.1 The user uses the quit function to confirm that they do not wish to save any of the information that has been entered for a reservation since the last save.

2.2.12.2 The system prompts the user with a dialog box stating that the reservation will not be saved and asking if the user would like to exit the reservation without saving any of the information entered.

2.2.12.3 The use case continues at Reservation Home.

2.2.13 Add a Pick Up and Return Date

2.2.13.1 The Renter Reservation use case initiates the Dates use case to add a pick up/return date and time

2.2.14 Add a Car Class

2.2.14.1 The Renter Reservation Use Case initiates the Dates and/or Rates use case.

2.2.15 Quote Rates

2.2.15.1 The Renter Reservation Use Case initiates the Quote a Rate use case.

2.2.16 Specials and Discounts

2.2.16.1 If the rental requires Discount or Special Rate information the use case initiates the Quote a Rate Use Case.

2.2.17 Add a Pick Up Method

2.2.17.1 The Renter Call Reservation use case initiates the Dates use case

2.2.18 Add Directions

2.2.18.1 The Renter Call Reservation Use Case Initiates the Dates use case.

2.2.19 Add Notes

2.2.19.1 The Renter Call Reservation Use Case initiates the Add Notes use case.

2.2.20 Add Cash Qualification

2.2.20.1 The Renter Call Reservation Use Case initiates the Cash Qualification use case.

2.2.21 Add Insurance Detail

2.2.21.1 The Renter Call Reservation Use Case initiates the Insurance Detail use case.

2.2.22 Add a Referral Source

2.2.22.1 The Renter Call Reservation Use Case initiates the Referral use case

3. Special Requirements – Basic Requirements UC

1. Bold the labels of required fields or put "*" next to the required fields.
2. Issuing Authority has a different validation than State Issued. State issued is a 2-letter code from a list of valid values. Issuing Authority is a free-form text field.
3. Basic Combo box behavior. The user should enter the letter "M" multiple time to position past Maine Maryland...to Missouri.

4. Pre-Conditions

5. Post-Conditions

6. System Generated Notes – Basic Res .

6.1 Notes should be generated when the following events take place :

Event	Note Text	When to Generate
The user chooses to "Rent" when a renter comes up "Renter Warning"	"Renter Warning overridden"	Create/Edit
The user chooses to bypass the warning when a driver's age is either over 70. 21-24 or 18-20 years of age .	"Underage/Overage warning overridden"	Create/Edit
The User changes the Renter's Home phone number	What Values were changed and what the old and new values are.	Create (if populated by Driver search)/Edit
The User changes any renter or additional driver's first or last name	What values were changed and what the old and new values are	Create/Edit
The user adds or deletes an additional driver	Driver "Last Name, First Name" was removed/ added	Create/Edit
The User changes the Work phone number of the Renter.	Renter "Last name, First name" Work Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit
The User changes the Other phone number of the Renter .	Renter "Last name, First Name" Other Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit
The User changes any Additional Driver's Home phone number.	Additional Driver "Last Name, First Name" Home Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit
The User changes any Additional Driver's Work phone number .	Additional Driver "Last Name, First Name" Work Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit
The User changes any Additional Driver's Other phone number .	Additional Driver "Last Name, First Name" Other Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit

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7. Extension Points

7.1 <Name of Extension Point>

8. Q's

- Is there a new requirement that asks to distinguish the underage edit between 18-20 and 21-24 instead of the 18-24 soft edit that is in place now? Yes
- Ability to list additional drivers as "With Valid Lic". Do we want to drive this behavior in Reservation? Free form text to
- Need to allow some way to input or identify if the "Address" field is business or home. Other than having home address and other address?
- Need a check box on the "Additional Driver" tabs to indicate if this person lives in the same household as the renter. In addition, there needs to be a compelling reason for the branch to actively pursue this. Has a compelling reason arisen yet?

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- Need to capture the business address and business name as main fields on the "Renter Screen". This needs to be integrated with Rent-a-car requirements and might mean putting the company name field just below driver and then adding a check box to indicate if it is a business address. Is there a corporate rental need for this or just truck rental?
- Need to be able to attach multiple reservations to one confirmation number. Is this still a business need since reservations are going to be unique and carry forward?

coal dust

<Enterprise Rent A Car>

<Create Reservation>
Use Case Specification: <ECARS 2.0 Reservation>

Version <1.0>

Revision History

Date	Version	Description	Author
<5/14/2001>	<1.0>	<Initial Draft>	<J. Gaines>
5/18/2001	1.1	Revisions based on internal review. Elimination of first repeat renter search screen.	J. Gaines
5/22/2001	1.2	Revisions based on feedback from user review with Jon and Mary: Single match no longer populates into renter info screen without being selected first. Cancel feature is now quit and exit and quit returns to Home instead of search screen.	J. Gaines
5/23/2001	1.3	Doc imported into Req Pro and requirements are marked.	J. Gaines
9/6/01	1.4	Changed wording from Telephone Number to Phone Number. Changed wording from Account Search to Search.	L. Moellman
10/10/2001	1.5	Removed requirements related to Save and Continue functionality	James Atteberry

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Use Case Specification: <ECARS 2.0 Reservation>

1. Create Reservation

1.1 Brief Description

This use case describes how a user is presented with options for creating a reservation; the repeat renter search, the add new renter and the applicable areas in which to record and save information about the reservation with at least the minimum reservation criteria.

2. Flow of Events

2.1 Basic Flow

2.1.1 The user chooses to create a new reservation.

2.1.2 The system defaults the location to the Group and Branch number where the user logged in.

2.1.3 The system assigns a unique reservation number to the reservation. (See Special Requirements).

2.1.4 The system displays the following criteria for the user to search on:

- Last Name (implied wildcard search)
- First Name (first name can only be used as a search criteria in conjunction with last name)
- Phone Number (will search home, work, other)
- Driver's License Number
- Date of Birth

2.1.5 The system displays the option to add a new renter to this reservation . If the user selects to Add New Renter, the use case continues at alternative flow (New Renter).

2.1.6 For the basic flow, the user will enter last name and phone number as the search criteria.

2.1.7 The user initiates the search.

2.1.8 The system validates the search criteria entered. If only a last name was entered as the lone search criteria, the use case continues at (Last Name Only). If only a date of birth was entered as the lone search criteria the use case continues at alternative flow (Date of Birth Only.)

2.1.9 The system searches for repeat renters in the repeat renter database, based on the criteria entered by the user.

2.1.10 The system retrieves all renter names and associated data that is stored for that renter that are associated with the search criteria entered. If no matches exist the use case continues at alternative flow (No Matches). If multiple matches exist, the use case continues at alternative flow (Multiple Matches). If the search takes longer than the prescribed time the use case continues at alternative flow (Quit). If there is a do not rent warning attached to the repeat renter profile, the use case continues at alternative flow (Renter Warning)

2.1.11 The system displays the single match retrieved from the repeat renter database.
The user has the option to do the following:

- The user selects the repeat renter record match from the list and the use case continues at alternative flow (One Match).
- Does not select the repeat renter match from the list, the use case continues at alternative flow (Add New Renter).
- Quit and the use case continues at alternate flow (Quit) . **(Note:** Not all renter profiles contain all data. The system will populate the data it has stored in the repeat renter profile).

2.1.11.1 The renter info fields are populated with the information retrieved, for the renter chosen, from the repeat renter database. The remaining renter information fields are displayed empty for the user to enter new renter information. (A list of available fields can be seen at 2.2.2.2)

2.1.12 The user has the option to continue the use case at the following alternative flows to perform any of the following options or combination of options:

- Add a New Renter (add renter information).
- Change Location
- Add a Pick-up Method
- Add a Pick-up and/or a Return Date.
- Add Additional Drivers
- Add a Bill-To
- Add a Referral Source.
- Add Renter's Vehicle/Shop Information.
- Quote Rates
- Add Insurance Detail
- Add Cash Qualification
- Add Directions
- Add Notes
- Create a Callback
- Print

2.1.13 The user has the option to "Complete Reservation" or Quit. If the user chooses to Quit the reservation the use case continues at alternative flow (Quit).

2.1.14 The system validates that the user has captured the minimum required information of Last Name, otherwise the use case continues at Alternative Flow (Incomplete Reservation)

2.1.15 The system generates and stores the following information:

- Date and Time of Creation
- Employee ID of the employee who created the reservation

(Note: This reservation can be viewed at a later time by utilizing various areas within the system)

2.1.16 The use case ends.

2.2 Alternative Flows

2.2.1 Change Location (pick up branch, return branch or both)

2.2.1.1 The user is allowed to change branch location only (for reservation pilot) within default group. **(Note:** ECARS 2.0 enhancement will allow change of group dependant upon security.)

2.2.1.2 The system will display the following information to the user:
The Pick up and return group and branch will default to the physical location of the terminal but will be able to be changed by the user. When the user selects the drop down list the system will display all of the rental branches for the group, with the current location highlighted.

2.2.1.3 The window will also display the following information to the user:

- Branch address
- Phone number
- Days of normal operation
- Hours of normal operation

This information will be read only. If a branch is not open a particular day the appropriate status will be displayed. The branches time zone will be visible as well as an indicator as to if the branch accepts after hour pickups and returns.

2.2.1.4 From the basic flow ( ), the user can change location by changing the Group and Branch number, or the user can change location by changing just the Branch number by selecting to Change GPBR. (See Special Requirements for rules of changing pick up and return branches)

2.2.1.5 The use case continues at ( ) in the basic flow.

2.2.2 Add New Renter

2.2.2.1 The user chooses to add a new renter reservation.

The renter info fields are populated with the current criteria entered in renter search . If there is no search criteria entered, there will be nothing populated in the renter info fields. The remaining renter information fields are displayed empty for the user to enter new renter information:

- **Most commonly entered information (North America):**
  - Last Name
  - First Name
  - Hm Phone
  - Wk Phone
  - Extension
  - Other Phone
  - Phone Description

- **Most commonly entered information (U.K.):**
  - Last Name
  - First Name
  - Hm Phone
  - Wk Phone
  - Extension
  - Other Phone
  - Phone Description

- **Less commonly entered information (North America):**
  - Address
  - Zip
  - Country
  - City
  - State
  - Other Address
  - Employer
  - License Number
  - Expiration Date
  - State Issued
  - DOB (Date of Birth)
  - SSN
  - Height – Feet Height –
  - Inches
  - Weight
  - Hair Color
  - Eye Color

Primary Payment Method is part of the above list but will not be implemented until E2

- **Less commonly entered information (U.K.):**Address (A 2nd renter address field is added in U.K.)
  - Postal Code
  - Country
  - City
  - County
  - Other Address
  - Employer
  - Licence Number (note difference in spelling)
  - Expiration Date Issuing Authority DOB (Date of Birth)
  - National ID
  - Height – Feet (NOT CAPTURED IN U.K.)
  - Height – Inches (NOT CAPTURED IN U.K.)
  - Weight (NOT CAPTURED IN U.K.)
  - Hair Color (NOT CAPTURED IN U.K.)
  - Eye Color (NOT CAPTURED IN U.K.)

Note: Primary Payment Method (note: "check" is spelled "cheque") is part of the above list but will not be implemented until E2. Renter has the option of initiating any of the following options:

- Enter data for above listed fields
- Cash Qualification
- Insurance Detail
- Update Repeat Renter
- Direction
- Notes

(Note: Cash qualification, directions, notes and insurance detail are alternative flows that initiate the Renter use case**)**

2.2.2.3 User enters renter's last name.

2.2.2.4 Use case continues at ( ) of the basic flow.

2.2.3 One Match From the basic flow, the system displays the single match under the following headers to the user:

- Renter First and Last Name
- Street Address
- City
- Home Phone
- Office Phone (and extension)
- Other Phone
- Date of Birth

2.2.3.2 The search results are displayed in the following sort order:

- Alphabetically by renter's last name.

2.2.3.3 The user has the option to do the following:

- The user selects a repeat renter record from the list and continues at ( ) of the basic flow.
- Not to select a repeat renter from the list, the use case continues at alternative flow (Add New Renter).
- Search again

2.2.4 No Match From the basic flow ( ), the system displays a zero result set with a message indicating no matches found and the continues at (renter search) of the basic flow, otherwise the user has the option to add a new renter and the use case continues at (Add New Renter).

2.2.5 Multiple Matches

2.2.5.1 The system retrieves multiple repeat renter records that have an exact match on the criteria entered by the user.

2.2.5.2 The system displays a list of all of the repeat renter records that match the information that was input under the Renter Search criteria. The system will make distinguishable any renter that appears on the Do Not Rent List If the user selects one of these DNR renters the use case continues at Alternative Flow (Renter Warning). The system displays the following information to the user:

- Renter First and Last Name
- Street Address
- City
- Home Phone
- Office Phone (and extension)
- Other Phone
- Date of Birth

2.2.5.3 The search results are displayed in the following sort order:

- Alphabetically by renter's last name.

2.2.5.4 The user has the option to do the following:

- The user selects a repeat renter record from the list and continues at ( ) of the basic flow.
- Not to select a repeat renter from the list, the use case continues at alternative flow (Add New Renter).
- Search again

2.2.6 Last Name Only

2.2.6.1 If last name is the only search criteria entered, the system will prompt the user with an error message to enter additional search criteria and the use case continues at ( ) of the basic flow..

2.2.7 Search by Renter's First Name

2.2.7.1 The user enters a renter's first name. The system searches for a match on the text, starting from the first position in the field. (There is an implied wildcard at the end of the character set entered but no leading or imbedded wildcards within the character set). (Note: First name field is disabled until a valid value is entered in the last name field).

2.2.8 Date of Birth Only

2.2.8.1 If date of birth is the only search criteria entered, the system will prompt the user with an error message to enter additional search criteria and the use case continues at ( ) of the basic flow.

2.2.9 Quit

2.2.9.1 The user uses the quit function to confirm that they do not wish to save any of the information that has been entered for a reservation since the last save.

2.2.9.2 The system prompts the user with a dialog box stating that the reservation will not be saved and asking if the user would like to exit the reservation without saving any of the information

entered.

2.2.9.3 The use case continues at Reservation Home.

2.2.10 Incomplete Reservation

2.2.10.1 The system displays a message notifying that the user has not captured the minimum required information necessary (Renter's Last Name) to create a reservation.

(Note: The user cannot move the message box to the side and attempt to navigate any area on the screen to enter required information. They must click "OK" to dismiss the message box and enter the required information.)

2.2.11 Renter Warning

2.2.11.1 The system displays a renter-warning window when a renter who is on warning is selected. These fields are display only.

2.2.11.2 The default setting on the window is do not rent. The user can select to override the do not rent by selecting rent.

- If the user selects do no rent, the system returns the user to Reservation Home.
- If the user chooses to rent, then the user returns to the reservation area and the renter's information is populated from the repeat renter database into their appropriate reservation fields and a system note should be generated and viewable in the notes area.

2.2.12 Add a Pickup and Return Date

2.2.12.1 The Create Reservation use case initiates the Renter use case.

2.2.13 Add Cash Qualification

2.2.13.1 The Create Reservation use case initiates the Renter use case.

2.2.14 Add Insurance Detail

2.2.14.1 The Create Reservation use case initiates the Renter use case.

2.2.15 Add a Pick Up Method

2.2.15.1 The Create Reservation use case initiates the Renter use case.

2.2.16 Add Additional Drivers

2.2.16.1 The Create Reservation use case initiates the Renter use case.

2.2.17 Add Notes

2.2.17.1 The Create Reservation use case initiates the Renter use case.

2.2.18 Add Directions

2.2.18.1 The Create Reservation use case initiates the Renter use case.

2.2.19 Add a Bill-To

2.2.19.1 The Create Reservation use case initiates the Create reservation with a Bill-To use case.

2.2.20 Create a Callback

2.2.20.1 The Create Reservation use case initiates the Create reservation with a Bill-To use case.

2.2.21 Add a Referral Source

2.2.21.1 The Create Reservation use case initiates the Create Reservation with a Referral use case.

2.2.22 Add Vehicle/Shop Information

2.2.22.1 The Create Reservation use case initiates the Referral use case.

2.2.23 Quote Rates

2.2.23.1 The Create Reservation use case initiates the Quote a Rate use case.

2.2.24 Add Additional Products/Taxes and Surcharges.

2.2.24.1 The create reservation use case initiates the Taxes use case

2.2.25 Print

2.2.25.1 The create reservation use case initiates the Print use case

2.2.26 Void

2.2.26.1 The Create reservation use case initiates the Edit Reservation use case.

2.2.27 Edit

2.2.27.1 The Create Reservation use case initiates the Edit Reservation use case.

2.2.28 Estimate charges

2.2.28.1 The Create Reservation use case initiates the Perot Pricing Engine use case

3. Special Requirements for Create Reservation UC

3.1.1 Requirements for the GUI Reservation number generator are as follows:

- The first character will be a numeric value and not start with a zero
- At least one of the characters other than the first character must be an alpha
- Only these values will be used for GUI reservation numbers (BCDFGHJKLMNPQRSTVWXYZ – 0123456789)
- All letters will be displayed in upper case

RENGUID – Rental GUI Transaction Database Please refer to use case table for requirement example.

Row #	Unique Key	GP	BR	GUI Reservation Number	ECARS/ARMS Reservation Number
1	123456781	01	01	1B0000	112233
2	123456782	01	01	1C0000	
3	123456788	01	01	B00000	

4	111222333	01	01	123456	123456
5	111122222	14	22	123456	123456
6	222111333	32	02	794568	794568

- Row 1 is an example of a reservation initially taken in GUI, sent to ECARS/ARMS, and then updated in ECARS. If a reservation is initially taken in GUI, the GUI database will not have the ECARS/ARMS reservation number unless it is updated by the ECARS/ARMS application.
- Row 2 is an example of a reservation initially taken in GUI and never updated by ECARS/ARMS.
- Row 3 is an example of a reservation initially taken at NatRes and brought into Rental GUI through AI's API.
- Row 4, 5, 6 are examples of a reservation initially taken in ECARS/ARMS and then interfaced to Rental GUI. The fifth and sixth rows depict that all Groups' reservations will be stored in a single database on the GUI application.

3.2 Edit Requirement

The data displayed in the populated reservation fields for the repeat renter search is editable.

3.3 Saving Requirements.

The system displays the Saved Reservation confirmation box . If the minimum reservation information has not been captured, the use case continues at Alternative Flow (Incomplete Reservation).

(Note: The Saved Reservation confirmation box confirms to the user that the reservation has been saved permanently to the database and that the user has captured the required information necessary to create a reservation. No reservation information is saved permanently to the database until a Save is initiated by clicking on the "Complete Reservation" button and the minimum required information necessary to create a reservation has been captured).

The system saves the reservation to the database.

The Saved Reservation confirmation message will be displayed. The message displays the current Reservation number of the record selected that was saved . The record's information is saved to the database and a system note is created capturing:

3.4 Fields in the repeat renter file:

- Renter First and Last Name
- Street Address
- City
- State
- Zip code/Postal Code
- Home Phone
- Office Phone (and extension)
- Driver License Number
- Driver License State
- Date Of Birth
- Date Last Rented

4. Pre-Conditions

4.1 The user has successfully logged onto the system.

5. Post-Conditions

6. System Generated Notes - Create

6.1 When a reservation is created, the system will generate the following note text, "Reservation Created".

7. Extension Points

8. Q's

- Are we allowing the user to update repeat renter information? Yes
- Do we want the user to be returned to renter search after electing not to rent on a DNR warning? Res Home
- Save and Exit should take the user where? Res Home
- Zero result set on renter search. Do we want to go to res info screen and populate with search criteria entered or do want to search again? Res Home

<Company Name>

ECARS 2.0 - Daily Reservation Detail Screen Action Specification

Revision History

Date	Version	Description	Author
5/10/2001	1.0	Created Document	Johnny S. Johnston
12/4/2001	1.1	Removed No Show and updated after modeler meeting.	Johnny S. Johnston
09/04/2001	1.2	Updated to reflect changes from Navigation	James Atteberry
10/03/2001	1.3	Added screen shot from Res Pilot version	James Atteberry
10/26/2001	1.4	Updated with changes for Res Pilot	James Atteberry

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Daily Reservation Detail screen.

The system must be able to distinguish, from the physical location of the terminal, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Daily Reservation Detail

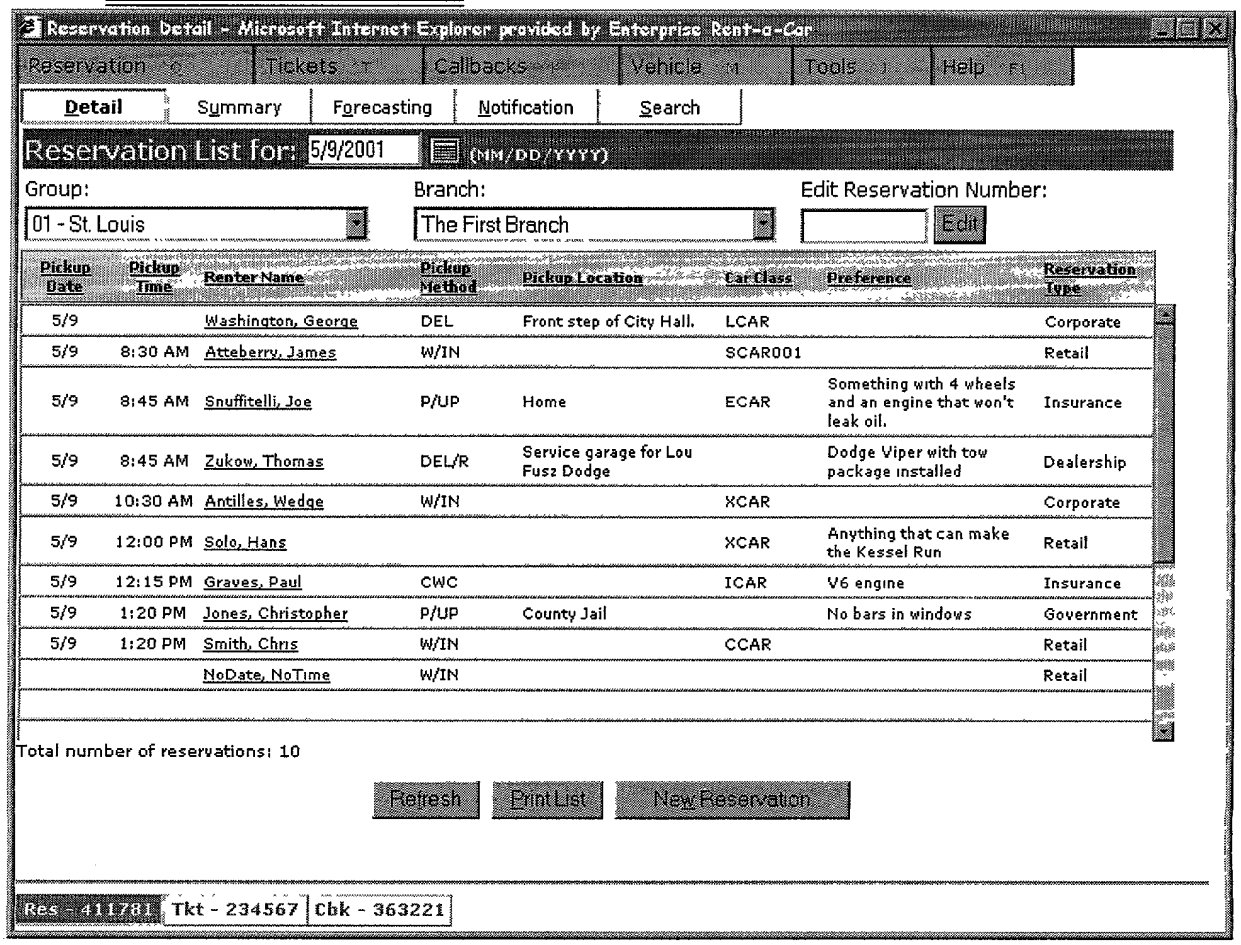

Figure 1 – Daily Reservation Detail

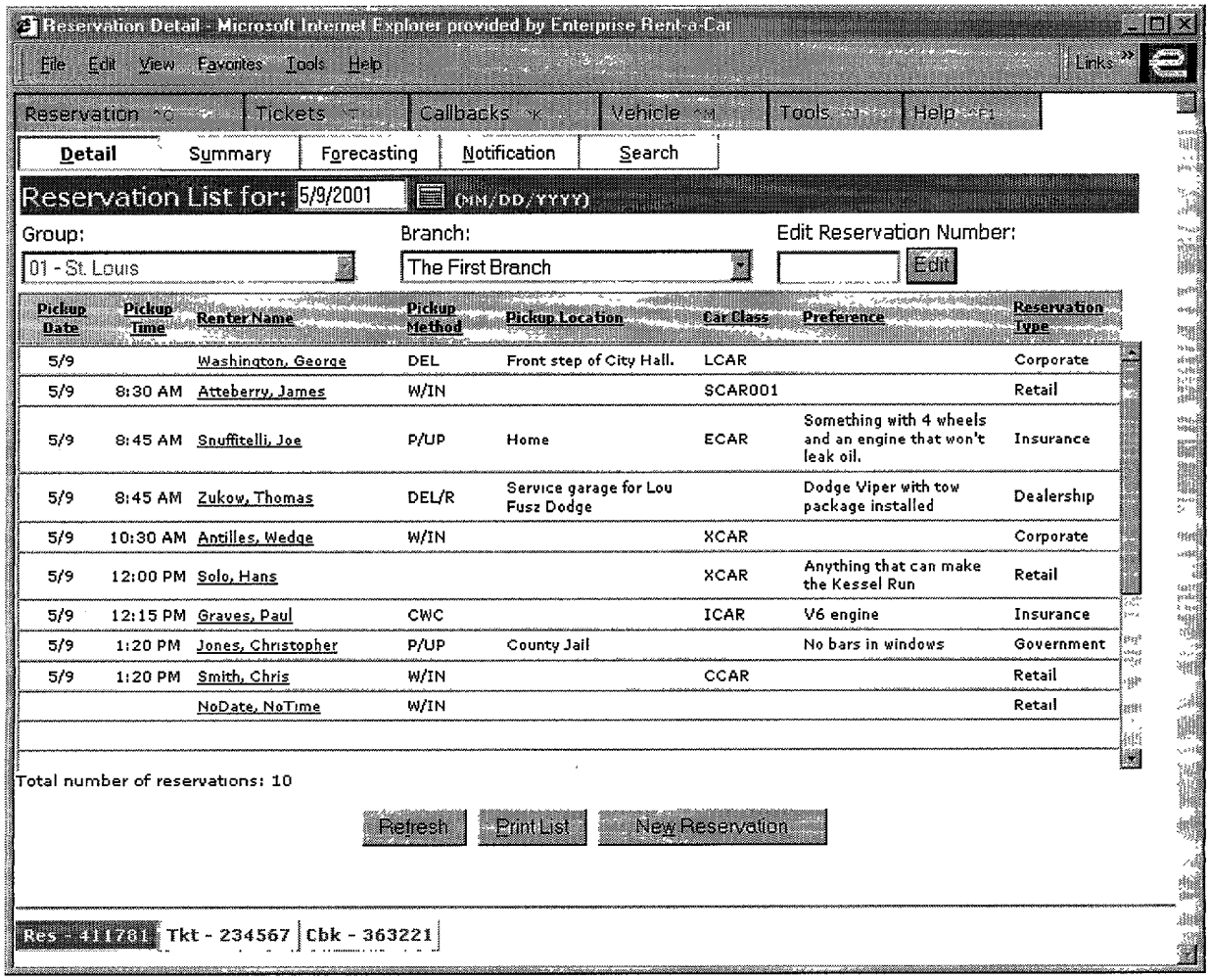

Figure 2 – Reservation Detail – Reservation Pilot version

3. Group

3.1 Behavior

This search criterion will be limited to those groups that exist at any point in time for which the search is being executed. For reservation pilot, this drop down will not be enabled. It will default to the physical location's group and the user will not be able to switch branches . The selection of "All" is NOT included in the list as it would return too large of a result set . This search criteria area will be a drop-down box . The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first string beginning with "H" in the list) Upon initial presentation of the panel this should default to the group associated to the terminal locale.

3.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. This should, in some manner, be initially defaulted to the terminal's group, (based on physical location)

3.3 Business Exceptions

None identified at this time.

3.4 System Exceptions

None identified at this time.

4. Branch

4.1 Behavior

This search criterion will be limited to those branches that exist within the group at any point in time for which the search is being executed . The selection of "All" is NOT included in this selection list as it would return too large of a result set . This search criteria area will be a drop-down box . The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character . (If the user enters an "H" the drop down list would position to the first string beginning with "H" in the list)

Upon initial presentation of the panel this should default to the branch associated to the terminal locale. Branch items appearing in the list will be limited to the Group item selected . Once the selected Group item has changed, the branch will be set to blanks . This will require the user to select a branch, at which time the display area will be refreshed, repopulated and repositioned. For Reservation Pilot, the Branch list will NOT contain a blank entry.

4.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. This should, in some manner, be initially defaulted to the terminal's branch, (based on physical location).

This list will be limited to the branches associated with the group selected.

4.3 Business Exceptions

If a user does not enter a branch, or blanks out this area, and attempts to refresh the list, an error message will be presented. See the "error message" supplemental spec for exact text.

4.4 System Exceptions

None identified at this time.

5. Reservation List Date

5.1 Behavior

This area will be a text field which will allow the user to enter the date for which they want to view reservations. The format to enter is mmddyyyy, 8 numeric characters, without any delineating characters. There will also be a calendar icon function which will allow the user to select it and be shown a monthly calendar for them to select a date . (As outlined in the HTML standards for Calendar Controls.)

Upon initial presentation of the panel this should default to the current date.

5.2 Validation

Validation will occur when the user submits the form. It must be a valid month, day and year combination. Please see error message supplemental spec for exact text.

5.3 Business Exceptions

If a user does not enter a date, or blanks out this area, and attempts to refresh the list, an error message will be presented. See the "error message" supplemental spec for exact text.

5.4 System Exceptions

None identified at this time.

6. Edit Reservation Number Field

6.1 Behavior

This criteria area will be an alphanumeric field . It will not be formatted for presentation purposes . When a user enters an alphanumeric string, and selects the edit function, the system will attempt to find an exact match for the characters entered. Also, if the user is in the process of entering a reservation, the focus will be on the edit function. With the focus on the edit function, if the "enter" key is selected, it will operate the same as if the edit function were selected .
If a single, exact match, is found the system will take the user to the edit/view reservation detail panel.
For reservation pilot, the system will search only reservations created within the Physical Terminal Location's group number.

6.2 Business Exceptions

If no matches are found the system presents a message. See error message spec for exact text.

If there are two or more matches found, the system displays the results as a display list exactly as described in the Reservation Search results display area. (Included below for clarity)

Multiple Result Display Criteria – Identical to Search Result Display
This display area provides the user with the search result list. The result list will be comprised of 8 static columns. The specific column order is:

1) The group number and branch number will be concatenated to form this column.
2) The pick up date is the next column, formatted by locale.
3) The pick up time is the next column, formatted by locale.
4) The renter's last name and first name will be concatenated to form this column.
5) The pick-up method.
6) The car class.
7) The reservation type.
8) The reservation number.

The display presentation for each type of information will adhere to result list standards.
The default sort order is:

1) Pick-up group and branch, in numeric ascending order.
2) Pick-up date, in chronologically in ascending order.
3) Pick-up time, in chronologically ascending order.
   For date and time sorting the following will be the standard:
   1. Reservations with a date, but no time.
   2. Reservations with a date and a time.
   3. Reservation with no date, but have a time.
   4. Reservations with no date and not time.
4) Renter last and first name, in alphabetically ascending order of last name.

The users would like to have the ability to sort the columns in both ascending and descending order. This will sort the entire result set. When a column is selected to sort, all other default or secondary sort criteria is abandoned. The manner in which Oracle sorts ascending and descending values will be used. The display area will position to the top of the entire result list based on the column selected to sort.
If the user moves forward or backward within the result list, the sort will still be in effect.

The capability also needs to exist where a user can indicate or select an individual reservation from the

result list, and perform a simple task, (a function button, icon, mouse click) which would then open the reservation for editing purposes. Within this display list the user would select the Renter Name from the display list and perform the designated function. This would be contingent upon the user having the appropriate security to edit the reservation selected. This functionality will be consistent and standard throughout the application.

6.3 System Exceptions

None identified at this time.

7. Reservation Display Area

7.1 Behavior

The display area will initially be defaulted to all reservations, for the default group, branch and date, positioned to where the pick up time is within a time frame of the current time less 30 minutes. All of the reservations for the group, branch and date will be returned for display, however the system will position the list to the reservation with the current time less 30 minutes.
Further elaboration/rules about how the display will position to a reservation follows:
1) If there are not any reservations for the 30 minute time frame, AND there are reservations with the date but no time, the list will be positioned to the first reservation without a time.
2) If there are not any reservations for the 30 minute time frame, but there is a reservation between the 30 minute time frame cutoff, and those with dates and no time, the system will position to the reservation in the future which is closest to the current time.
3) If there are not any reservations for the 30 minute time frame, AND there are not any with dates and no time, the system will position to the reservation in the future which is closest to the current time.
4) If there are not any reservations for the 30 minute time frame, AND there are not any with dates and no time, AND there are not any in the future, the system will position to either the first reservation with no date but has a time, or if none of those exist, the system will position to the first reservation without a date and without a time, if any exist.

Examples:
1) If the user signs on at 8:00 A.M., and there are not any reservations for 8:00 A.M. or before, and there are reservations with the date but without a time, the list will be positioned to those reservations without a time.
2) If the user signs on at 8:00 A.M., and there are not any reservations for between 7:30 and 8:00 A.M., but there is one for 7:15 A.M., and 8:15 A.M., and there are reservations with the date but without a time, the list will be positioned to the reservation in the future which is closest to 8:00 A.M., which is the 8:15 A.M., reservation.
3) If the user signs on at 8:00 A.M., and there are not any reservations for between 7:30 and 8:00 A.M., and there are reservations with the date but without a time, but there is one for 8:15 A.M the list will be positioned to the reservation in the future which is closest to 8:00 A.M., which is the 8:15 A.M., reservation.
4) If the user signs on at 8:00 A.M., and there are not any reservations for between 7:30 and 8:00 A.M., and there are no reservations with the date but without a time, and there are not any reservations for a future time, the system position to those at the bottom of the list, the first reservation without a date but with a time, and if none of those exist, it will position to the first reservation without a date and without a time.

The scroll bar will be enabled to allow the user to access all reservations.

The result list will be comprised of 7 static columns. The specific column order is:

1) The pick up time is the first column, formatted by locale.
2) The renter's last name and first name will be concatenated to form this column.

3) The pick-up method.
4) The pick-up location.
5) The car class.
6) Preference.
7) Rental Type.

Sort order of the list will be:

Reservations with a date, but no time.
Reservations with a date and a time.

The result list will display the reservations in chronological order from the start of the 30 minute time frame.

Reservation with no date, but have a time.
Reservations with no date and not time.

The users would like to have the ability to sort the columns in both ascending and descending order. This will sort the entire result set. When a column is selected to sort, all other default or secondary sort criteria is abandoned. The manner in which Oracle sorts ascending and descending values will be used. The display area will position to the top of the entire result list based on the column selected to sort.
If the user moves forward or backward within the result list, the sort will still be in effect.

The capability also needs to exist where a user can indicate or select an individual reservation from the result list, and perform a simple task, (a function button, icon, mouse click) which would then open the reservation for editing purposes. Within this display list the user would select the Renter Name from the display list and perform the designated function. This would be contingent upon the user having the appropriate security to edit the reservation selected. This functionality will be consistent and standard throughout the application.

7.2 Validation

The user may not select to edit a reservation that is outside of their security boundaries. If the user changes the group and the branch is positioned to blanks, the result list should be cleared also.

7.3 Business Exceptions

7.4 System Exceptions

None identified at this time.

8. Results Feedback Line Area

8.1 Behavior

This feedback area provides the user with the total number of reservations for the day. If there are 150 reservations for the group, branch, date, with or without pickup time, and then others without dates , the total shown would include all 150 which have the specific date, whether or not a pick-up time is specified, plus those without a date.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

Buttons would be enabled appropriately for list display area.

9. Button Line Area

9.1 Behavior

The Print List image/button will print the entire list of reservations for the day.

The Refresh image/button will reposition the entire list to the current time less 30 minute time frame.

The New Reservation button will create a new reservation, changing the screen to that reservation.

9.2 Validation

None identified at this time.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

None identified at this time.

10. Rules

Types of reservations, for the defaulted group and branch, or the selected group and branch, which will not be included in the displays are:

- Voided Reservations.
- Reservations transferred to another branch.
- Reservation that have been attached to an open ticket.

The refresh will be a manual process, no automatic refresh will happen while the user is on this panel.

11. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

<Enterprise Rent A Car>

ECARS 2.0 Reservation
Use Case Specification: <Daily Reservation Detail>

Version <1.0>

Revision History

Date	Version	Description	Author
<04/17/01>	<1.0>	<Initial draft of Daily Planning Use Case>	<J. Gaines>
4/19/01	1.1	Special Requirement details added to flows	J. Gaines

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Use Case Specification: <Daily Reservation Detail>

1. Daily Reservation Detail

1.1 Brief Description

This use case describes the view of a day's reservations to aid in the daily planning process for reservations. The daily activity view is a manually refreshable list of the current day's reservations for a group and branch. No-show reservations are no longer displayed by the system in the Daily Reservation List and are now displayed in a No-Show list.

2.1 Basic Flow

2.1.1 The Reservation Planning use case initiates the Daily Activity use case when the user chooses view the Daily Reservation list. The system defaults the location to the Group and Branch Number where the user logged in. {If the user changes location, the use case continues at alternate flow (Change Location)}.

2.1.2 The system checks the current date and time and retrieves the default group/branch reservations that have a pickup date equal to the branch's current local date and all reservations with no date . If no reservations are retrieved, the use case continues at alternate flow (No Records)

2.1.3 The system displays the Daily Reservation List as the daily activity default . The system displays to the user the results according to the following headers and sort order for the default group and branch only:

Column Headers for Daily Reservation List:

- Time
- Name
- Pick up Method
- Pick up Location
- Car class
- Preference
- Rental Type

Sort order for Daily Reservation List:

- Reservations with a date but no time.
- Reservations with a date and time.
- Reservations with no date but have a time.
- Reservations with no date and no time.

Note: Group, Branch and Date are retrieved by the system but not displayed.

2.1.4 The system displays the Daily Reservation List to the user so the following is visible and highlighted to the user:

- Reservations with a pick up date and time up to 30 minutes prior to the current date and time.
- The reservations with a pick up date and time equal to the current date and time.

2.1.5 The system can be refreshed by the user and checks the branch's current local date and time then retrieves and displays any new reservations* that have a creation date equal to the branch's current local date. These new reservations will display in a manner that make them distinguishable from the other reservations already in the list.

*A new reservation is one that:

- Natres reservations that are sent during the current day.

- ARMS reservations sent during the current day.
- Branch reservations that are created during the current for the current day.
- Reservations that are transferred from another branch for the current day.
- Reservations that are moved from another day to the current day within the same branch.
- Reservation for the current day that's time has been changed during the current day.

2.1.6 . The system checks the current date and time and retrieves the default group/branch reservations that have a pickup date equal to the branch's current local date and all reservations with no date

Any reservations with a pickup date of 1 day through 5 days prior to the current day will be displayed in the no-show list.

These reservations are displayed in their appropriate place in the reservation list according to the default sort order.

2.1.7 The user can perform the following options:

- If the user chooses to print the list, the use case continues at alternate flow (Print the list)
- If the user elects to print the details of a reservation from the list, the use case continues at alternate flow (Print the reservation details).
- If the user selects a reservation from the list to edit/view, the use case continues at alternate flow (Edit/View a reservation).
- If the user chooses to view the reservations for a different date, the use case continues at alternate flow (Change Date).
- If the user chooses to view the reservations for a different location, the use case continues at alternate flow (Change Location)
- If the user chooses to view the no-show reservations, the use case continues at alternate flow (View No-Shows)

Note: User may perform any combination of the above options.

2.1.8 The use case continues at (2.1.4) of the basic flow.

2.2 Alternative Flows

2.2.1 Reservation Search

Link

2.2.1.1 The user elects to search for a reservation from the Daily Activity panel.

2.2.1.2 Initiate Reservation search use case.

2.2.2 View No-Shows

Link

2.2.2.1 The user chooses to view the no show reservations for the default group/branch.

2.2.2.2 The system will retrieve all daily reservations that match the default group/branch for a date and time 1 day through 5 days prior to the branch's current local date and time. If the system retrieves no reservations, the use case continues at alternate flow (No Records).

2.2.2.3 The system displays a list of reservations according to the Daily Reservation list sort order and column headers. The reservations will display in descending date and time order. If the system retrieves no reservations, the use case continues at alternate flow (No Records).

2.2.2.4 Reservations that are in the no-show list have been displayed there by the system after 1 calendar day has passed after the reservations pickup date.

- Date
- Time
- Name
- Pick up Method
- Pick up Location
- Car class
- Preference
- Rental Type

Sort order for No-show Reservation List:

- Reservations with a date but no time.
- Reservations with a date and time.
- Reservations with no date but have a time.
- Reservations with no date and no time.

2.2.2.5 The system removes reservations from the no-show list 6 calendar days after the reservation pick up date.

2.2.2.6 From within no-show list the user can perform the following options:

- If the user chooses to print the list of no-show reservations, the use case continues at alternate flow (Print the list)
- If the user elects to print the details of a no-show reservation from the list, the use case continues at alternate flow (Print the reservation details).
- If the user selects a no-show reservation from the list to edit/view, the use case continues at alternate flow (Edit/View a reservation).

2.2.3 Change Location

2.2.3.1 The user is allowed to change location to view a branch's daily reservation list.

2.2.4 From the basic flow (2.1.3), the user can change location by changing either the group number or the branch number or both.

2.2.5 The user selects the branch drop down list from the detail screen.

2.2.6 The system will display the rental branches for the group, defaulting to the current location.

2.2.7 The user selects a branch from the drop down list.

2.2.8 The system will display a view of the selected branch's daily activity for reservations and the use case continues at (2.1.2) of the basic flow.

2.2.9 Change Date

2.2.9.1 The user is allowed to change date as far into the future and past as the system allows, to view a daily reservation list. Note: the ability to edit a reservation for another branch is dependant upon security.

2.2.9.2 The use case continues at (2.1.2) of the basic flow.

2.2.10 No Records

2.2.10.1 The system displays a zero results list display and the use case continues.

3. Special Requirements - Daily Reservation Detail UC

1. As in Search Reservation use case, Column Headers are sortable.

2. Types of reservations not shown in the default group/branch daily reservation list are as follows:
   - Voided reservations .
   - Reservations transferred to another branch .
   - Reservations that have been attached to an open ticket.

3. When looking at lists of reservations, the total number of reservations for the day should be displayed.

4. Refresh will be manual refresh. Business does not want refresh to interrupt work in an application. Should not refresh while scrolling through a reservation list. Should not refresh so as to be noticeable by the user while working in an application .

5. Manual refresh of reservation displays – The screen will be refreshed when the user chooses "Refresh". The screen will also refresh after the user leaves and then reenters a reservation display.

7. In the alternate flow (Pick up Summary screen), from the pick up summary display, the user should be able to click on the time and "hyperlink" to that time in the Daily Reservation list.

4. Pre-Conditions

4.1 The user has successfully logged onto the system.

5. Post-Conditions

5.1 < Post-condition One >

6. Extension Points

6.1 <Name of Extension Point>

<Company Name>

SUBJECT * MERGEFORMAT E CARS 2.0 - Daily Reservation Summary Screen Action Specification

Revision History

Date	Version	Description	Author
5/15/2001	1.0	Created Document	Johnny S. Johnston
5/29/01	1.1	Updated for list display resolution	Johnny S. Johnston
09/04/2001	1.2	Updated to reflect changes from Navigation use case	James Atteberry
10/03/2001	1.3	Added screen shot from Reservation Pilot version.	James Atteberry
10/26/2001	1.4	Clarified Branch list behavior for Reservation Pilot	James Atteberry

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Daily Reservation Summary screen.

The system must be able to distinguish, from the physical location of the terminal, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Daily Reservation Summary

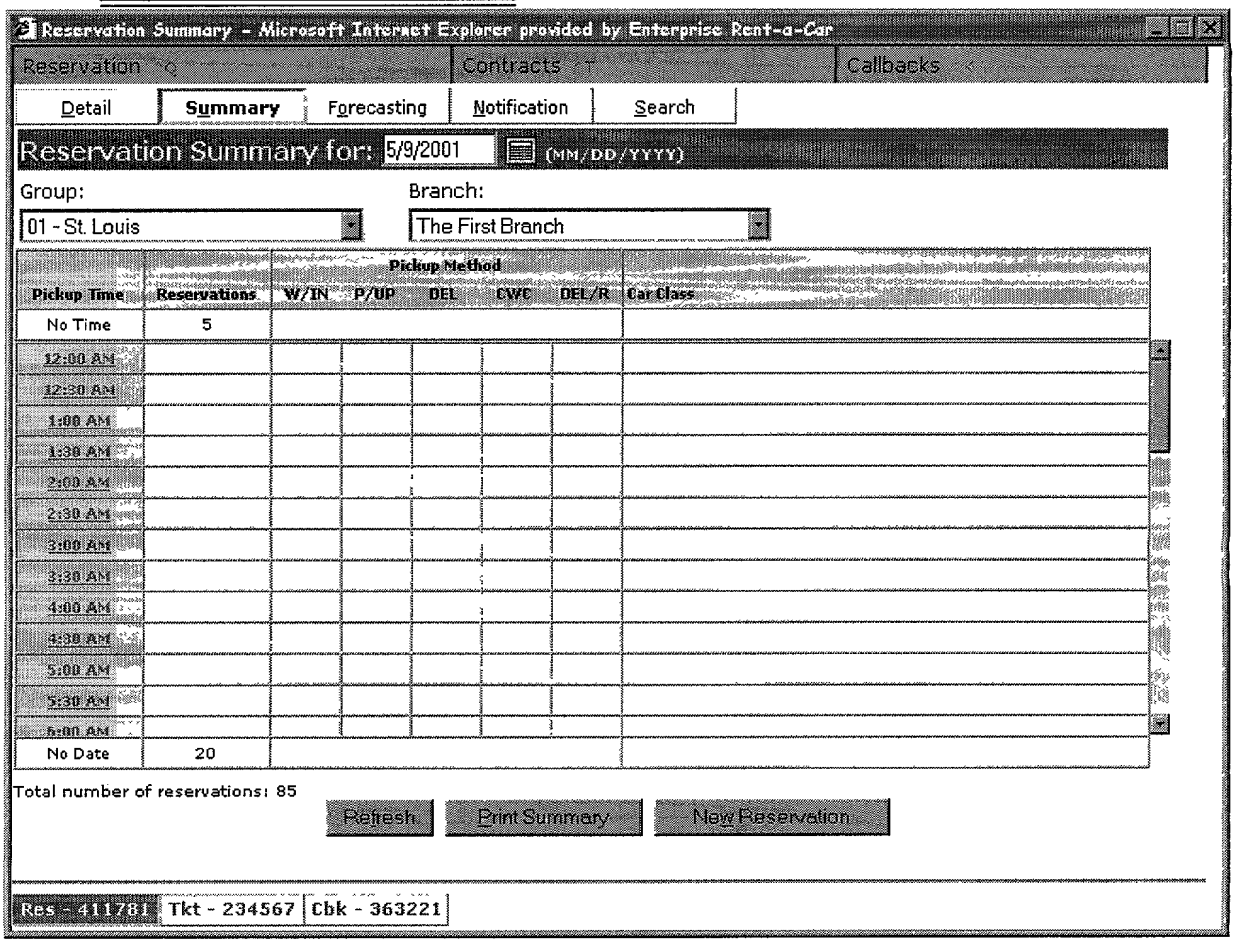

Figure 1 – Daily Reservation Summary

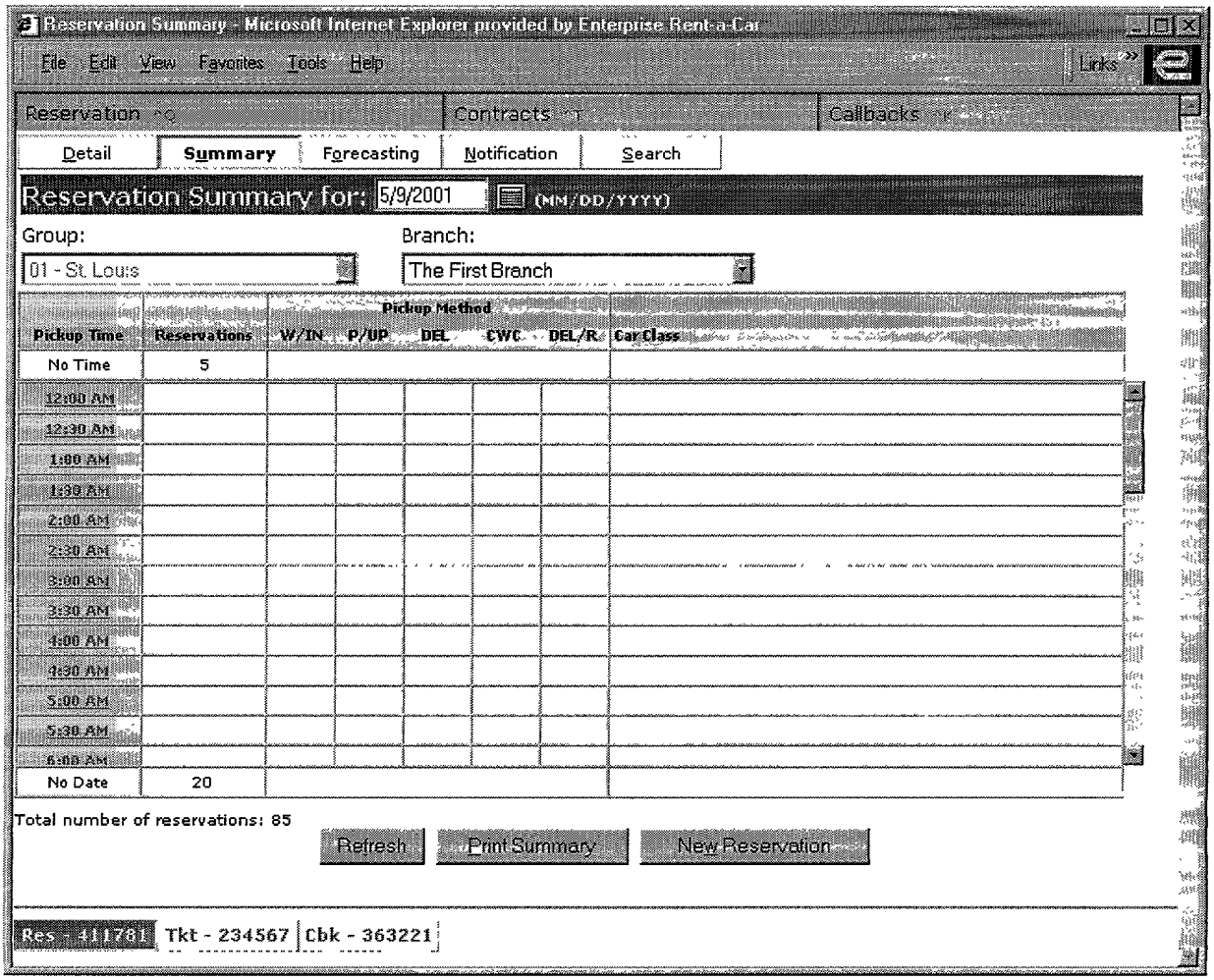

Figure 2 – Daily Reservation Summary – Reservation Pilot version

Group

3.1 Behavior

This search criterion will be limited to those groups that exist at any point in time for which the search is being executed . The selection of "All" is NOT included in the list . This search criteria area will be a drop-down box For Reservation Pilot, the drop down will only display the user's physical terminal's location and the user will not be able to select another group . The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first string beginning with "H" in the list) Upon initial presentation of the panel this should default to the group associated to the terminal locale.

3.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically . This should, in some manner, be initially defaulted to the terminal's group, (based on physical location)

3.3 Business Exceptions

None identified at this time.

3.4 System Exceptions

None identified at this time.

4. Branch

4.1 Behavior

This search criterion will be limited to those branches that exist within the group at any point in time for which the search is being executed . The selection of "All" is NOT included in this selection list. This search criteria area will be a drop-down box . The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first string beginning with "H" in the list) Upon initial presentation of the panel this should default to the branch associated to the terminal locale . Branch items appearing in the list will be limited to the Group item selected . Once the selected Group item has changed, the branch will be set to blanks . This will require the user to select a branch, at which time the display area will be refreshed, repopulated and repositioned. For Reservation Pilot, the Branch list will NOT contain a blank entry.

4.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically . This should, in some manner, be initially defaulted to the terminal's branch, (based on physical location). This list will be limited to the branches associated with the group selected .

4.3 Business Exceptions

If a user does not enter a branch, or blanks out this area, and attempts to refresh the list, an error message will be presented. See the "error message" supplemental spec for exact text.

4.4 System Exceptions

None identified at this time.

5. Reservation List Date

5.1 Behavior

This area will be a text field which will allow the user to enter the date for which they want to view reservations . The format to enter is mmddyyyy, 8 numeric characters, without any delineating characters . There will also be a calendar icon function which will allow the user to select it and be shown a monthly calendar for them to select a date . (As outlined in the HTML standards for Calendar Controls.) Upon initial presentation of the panel this should default to the current date .

5.2 Validation

Validation will occur when the user submits the form. It must be a valid month, day and year combination.

5.3 Business Exceptions

If a user does not enter a date, or blanks out this area, and attempts to refresh the list, an error message will be presented. See the "error message" supplemental spec for exact text.

5.4 System Exceptions

None identified at this time.

6. Reservation Display Area

6.1 Behavior

The display area will initially be defaulted to all reservations, for the default group, branch and date. The list is positioned to the ½ hour increment prior to the current time on initial entry, or on refresh, and displays the number of reservations within ½ hour time increments . The scroll bar will be enabled to allow the user to view all reservations.

The result list will be comprised of 7 static columns, and a text area . The specific column order is:

1) Time is the first column, formatted by locale, and shown in ½ hour increments .
2) The number of reservations that have a pick-up time associated with that ½ hour increment will be displayed next .
   The next 5 columns will be the number of times that particular pick-up method appears on reservations within the ½ hour increment . The 5 pick-up methods are:
3) Walk In .
4) Pick-Up .
5) Delivery .
6) Customer Will Call .
7) Delivery With Ride Back .
   This is the text area which will contain:
8) Car Class Summary Area – This will display all of the car classes on the reservations within that ½ hour time increment and the number of times that particular car class appears.

The sort order of this list is strictly by the pick-up time and where it falls within the ½ hour time increments displayed . If there are no reservations for a given ½ time increment, then the second column will not have any values shown and will be blank.. The list will start at 12:00 A.M. and continue until 11:30 P.M. Reservations without a time will appear in a header above the list. Reservations without a date and time will appear in a footer below the list.
(These hours may be subject to change in the future, or modifiable, on a case-by-case basis, based on a specific branch's hours of operation.)

The columns within this display list will NOT be sortable .

The capability also needs to exist where a user can select a ½ hour time increment and be taken to, or have displayed, the Daily Reservation Detail panel positioned to that selected time increment .

6.2 Validation

The user may not select to edit a reservation that is outside of their security boundaries .

6.3 Business Exceptions

If a user attempts to edit a reservation that is outside of their security boundaries, an error message of "User is not authorized to edit this reservation" should be displayed .

6.4 System Exceptions

None identified at this time.

7. Results Feedback Line Area

7.1 Behavior

This feedback area provides the user with the total number of reservations for the day . If there are 150 reservations for the selected group, branch and date, with or without pickup time, and 10 without pickup

dates and without pick-times, the total shown would be 160.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

Button would be enabled appropriately for list display area.

8. Button Line Area

8.1 Behavior

The Refresh image/button will refresh and repopulate the entire list .

The Print List image/button will print the entire list of reservations for the day .

The New Reservation button will create a new reservation, changing the screen to that reservation.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time.

9. Rules

Types of reservations, for the defaulted group and branch, or the selected group and branch, which will not be included in the displays are :

- Voided Reservations .
- Reservations transferred to another branch .
- Reservation that have been attached to an open ticket .

The refresh will be a manual process, no automatic refresh will happen while the user is on this panel .

10. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

<ECARS 2.0 Reservation> Use Case Specification: <Edit Branch/ARMS/NATRES and Void>

Version <1.0>
Draft

Revision History

Date	Version	Description	Author
<7/20/01>	<1.0>	<details>	<J. Gaines>
09/12/2001	1.1	Updated screen shots	James Atteberry
10/11/2001	1.2	Removed Clear button from Driver prototype and updated screen shot.	James Atteberry
10/12/2001	1.3	Clarified wording on how editing a NatRas reservation works. Clarified wording on handling Voided and Closed reservations.	James Atteberry
10/18/2001	1.4	Added Record Lock Requirements	J. Gaines

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Use Case Specification: <Edit Branch/ARMS/NATRES and Void>

Edit Branch/ARMS/NATRES and Void

1.1 Brief Description

This use case describes the edit process and field behaviors and dependencies when editing a branch reservation, an ARMS reservation and a NATRES reservation. Void rules for reservations are also included.

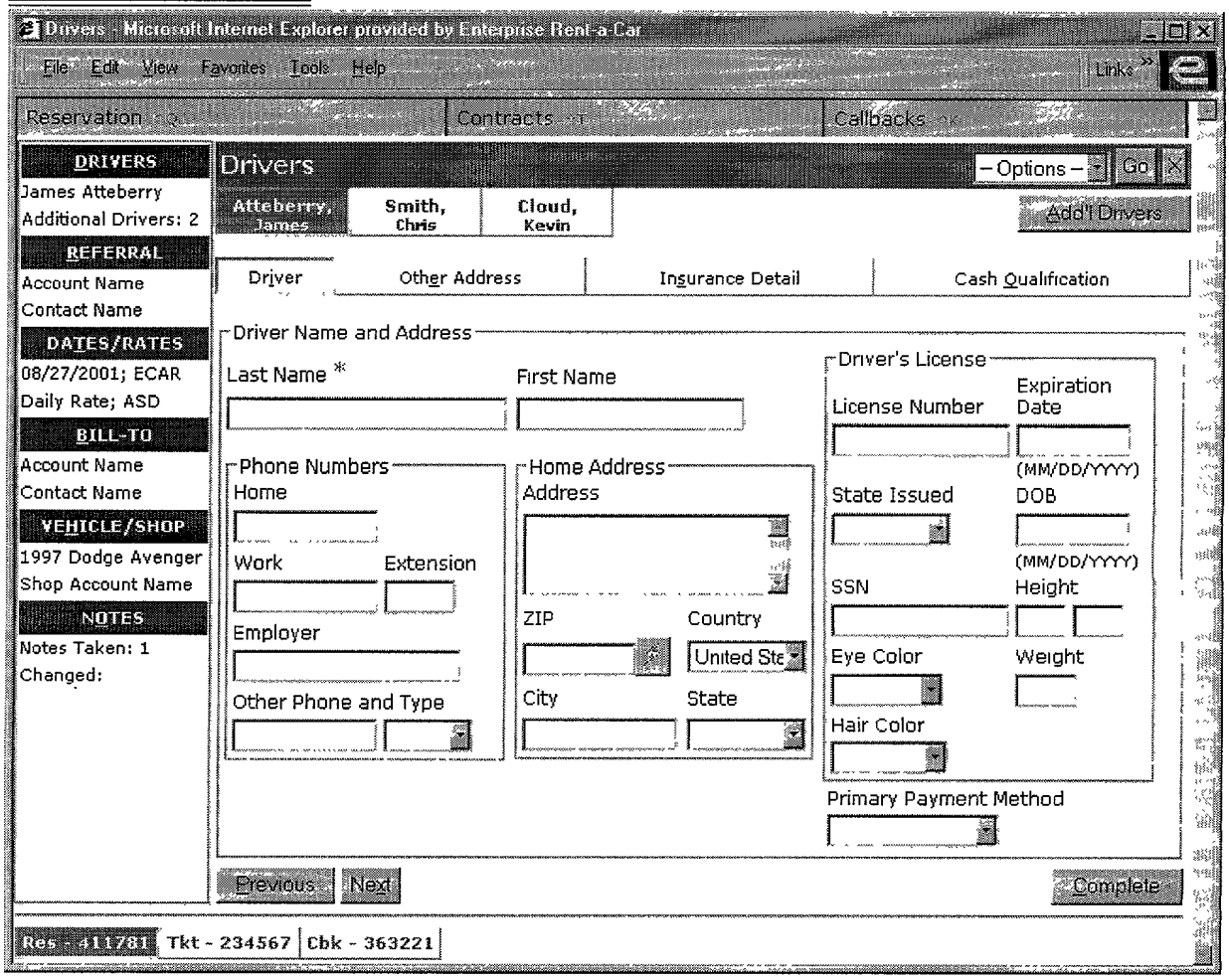
Pre-Conditions

1.2 The user can enter the reservation for editing from all points of entry into reservation.

1.3 The system is able to determine what kind of reservation the user is editing (branch, arms, natres, internet)

1.4 The system is able to determine whether a reservation is for the group of the physical terminal location or from another group.

Figure 1: Driver Screen:



Branch Reservation Edit

1.5 Update

- Update button does not show for Edit.

1.6 Clear

- Clear button blanks out all driver fields except Country and country issued which are defaulted to the country of the terminal's physical location.

1.7 Driver Fields

1.7.1 Name:

- If last name is deleted, the user cannot save the reservation. No edit rules for first name in reservation.
- If the user selects Update and the driver's last name and/or first name is changed, no driver associated information fields are cleared.

1.7.2 Phone Numbers:

- If Work Number is deleted, the extension will blank out.

- If Other Phone is deleted, type will reset to blank.

1.7.3 Address:

- No edit rules for deleting or changing address in reservation.

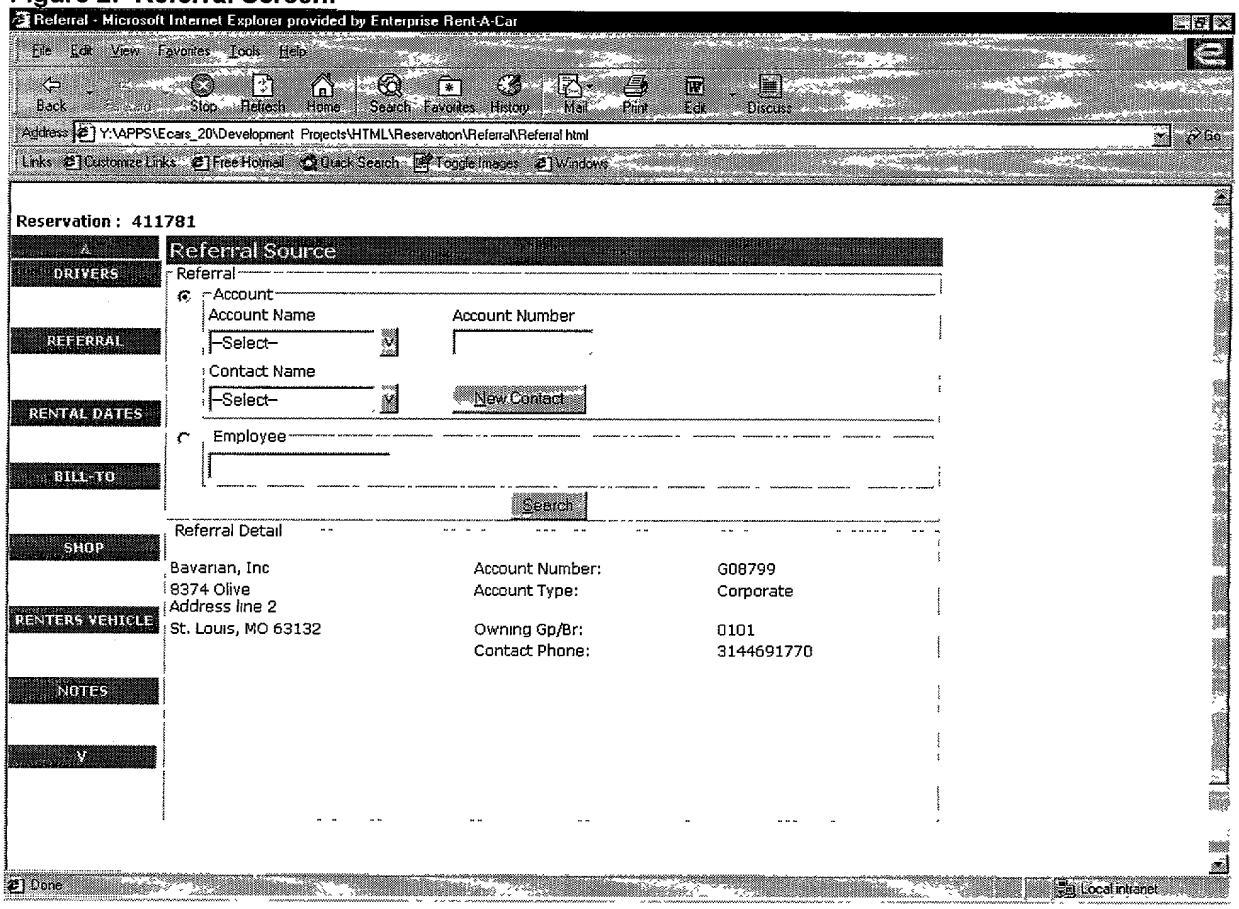
1.7.4 Driver's License Fields:

- If a driver's license number is added then the state issued, expiration date and DOB fields need to be entered as well.
- If a driver's license number is edited, none of the other license fields need to be changed or blanked out by the system.
- If any of the four driver's license fields are deleted, the other driver's license information that is entered remains, but upon saving the reservation, the system will alert the user to the missing piece(s) of driver's license information.

1.7.5 Primary Payment Method:

- No edit rules exist for changing primary payment method in reservation.

Figure 2: Referral Screen:



1.8 Referral Fields

1.8.1 Account Name:

- If account name is changed (to a valid account), account number will change appropriately and

the contact name will now be "select".

1.8.2 Account Number:

- If account number is changed, the account name will change appropriately and the contact name will now be "select".

1.8.3 Employee Number:

- There are no edit rules for reservation on changing or deleting an employee number.

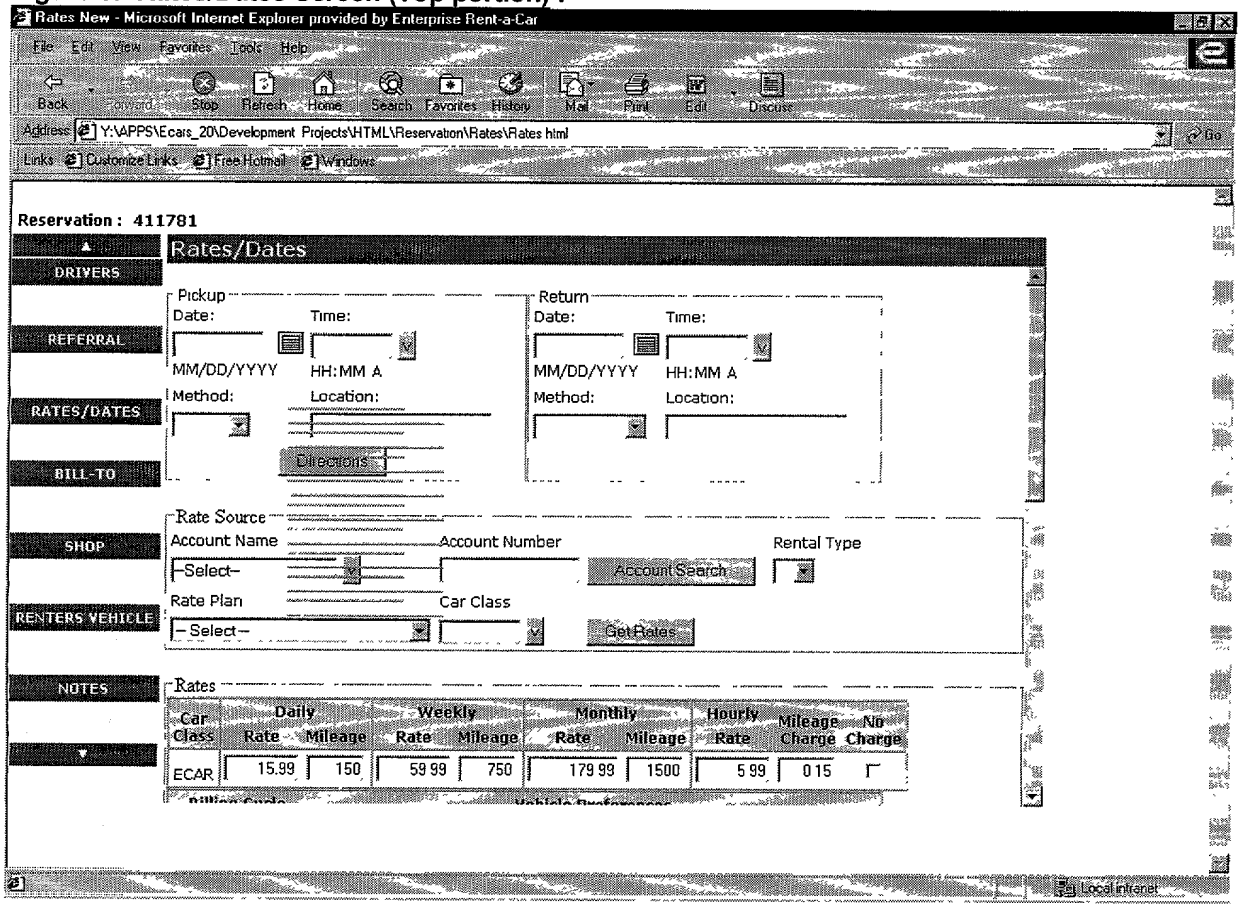
1.8.4 Contact Name

- If contact name is deleted, an error message will be displayed to the user to add a contact name upon complete reservation.

1.8.5 If the user decides to remove an account as a referral option, this is the way the app should behave:

- If the user blanks out the account name and tabs off or leaves the field, the Account Number and Contact should also be blanked out.
- If the user blanks out the account number and tabs off or leaves the field, the Account Name and Contact should also be blanked out.

Figure 3: Rates/Dates Screen (Top portion) :



1.9 Date Fields

1.9.1 Pick up Date:

If a pickup date/time already exists in a reservation:

- If the pick up date is deleted, the pick up time is also blanked.
- If the pick up date is changed, the new date follows the same rules for entering pickup date.
- If pick up date is entered and it is after the return date the user will receive an error message that pick up date is after the return date and the correction must be made by the user.
- If the pickup date is in the past but the field has not been touched during edit, the system will not validate the date in this field during edit.

1.9.2 Pick Up Time:

- If the pickup time is changed, the new time must meet the same rules for entering pickup time.

1.9.3 Pickup Method:

- If the pick up method is changed, the location will remain.

1.9.4 Return Date:

If a return date/time already exists in a reservation:

- If the Return date is deleted, the return time is also blanked.
- If the return date is changed, the new date follows the same rules for entering return date.
- If return date is entered and it is before the pick up date, the user will receive an error message that return date is before the return date and the correction must be made by the user.
- If the return date is in the past but the field has not been touched during edit, the system will not validate the date in this field during edit.
-

1.9.5 Return Time:

- If the return time is changed, the new time must meet the same rules for entering return time.

1.9.6 Return Method:

- If the return method is changed, the location will be blanked out.

1.10 Rate Fields

1.10.1 Account Name

- If account name is deleted, the account number and rate plan fields will be blanked.
- If the account name is changed, the same guidelines for entering an account name apply. Must choose from dropdown or from Search. Once a new account name is chosen, the account number will populate and if there is only one rate plan for that account that will populate as well. If there is more than one rate plan to choose from the rate plan field will display "select".

1.10.2 Account Number

- If account number is deleted, the account name and rate plan fields will be blanked.
- If the account number is changed, the same guidelines and validations for entering an account number apply. Once a new account number is chosen, the account name will populate and if there is only one rate plan for that account that will populate as well. If there is more than one rate plan to choose from the rate plan field will display "select".

1.10.3 Rental Type

- No business rules for editing Rental type apply in reservation.

1.10.4 Rate Plan

- If the user changes the rate plan, "get rates" must be pressed to retrieve the rates for that rate plan.

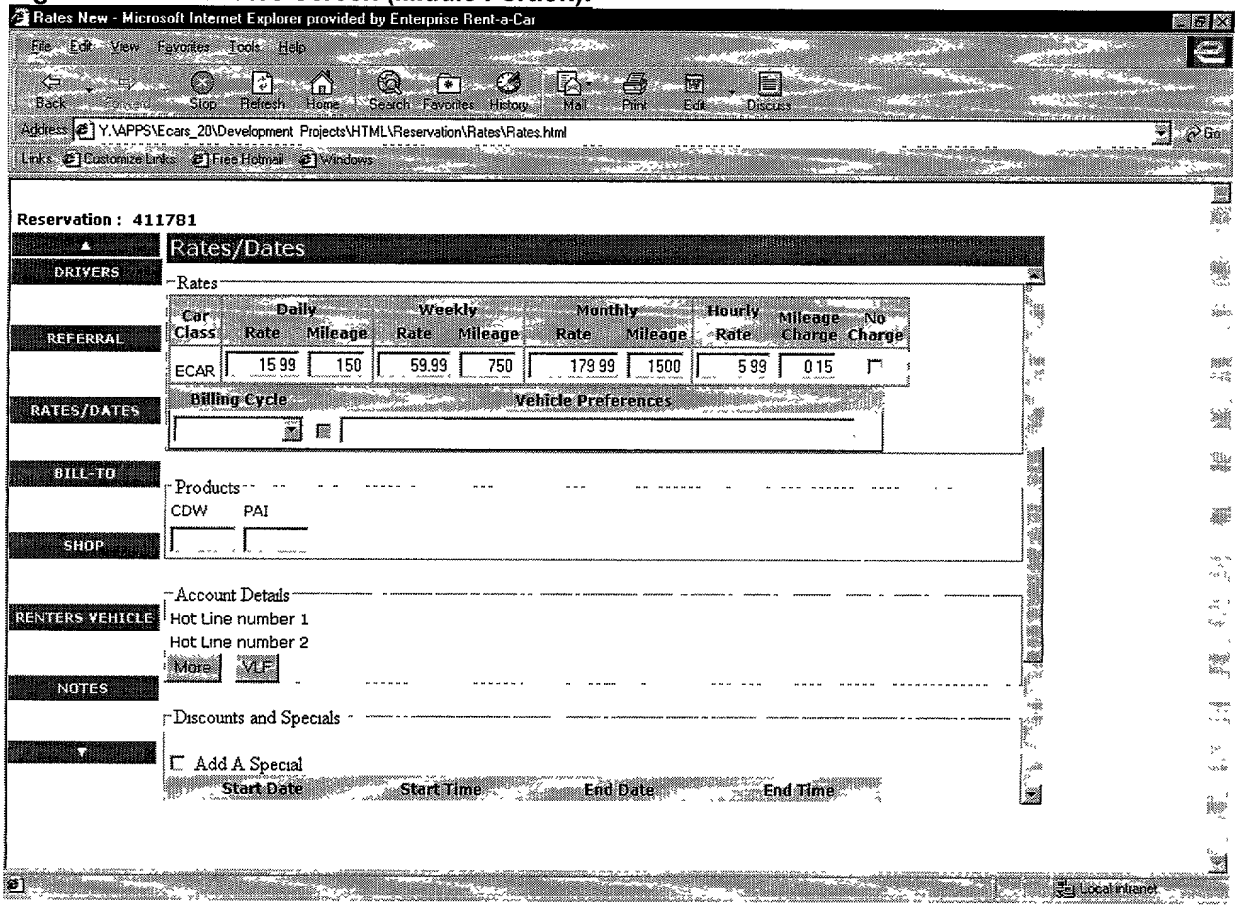
1.10.5 Car Class

- If car class is changed, "get rates" must be pressed to retrieve rates for the new car class entered.
- If car class is deleted and the get rates button is pressed the table of rates for the rate source/plan entered will be displayed. The user has the ability to select a car class from the table.
- If there was no car class originally entered but there were rates entered and the user selects a car class, the rate originally entered will remain unless the user manually types over the rates or selects a car class from the table of rates after choosing get rates.
- Car class may be manually entered with no other rate information.

1.10.6 Rates

- Rates May be manually entered without a Rate Source.
- Rates can be deleted.
- Rates that are edited will remain after the rate source is changed unless a different car class is selected from get rates.
- Hitting Cancel after getting rates will keep rates.

Figure 4: Rates/Dates Screen (Middle Portion):



1.10.7 Billing Cycle

- There are no edit business rules associated with this field in reservation.

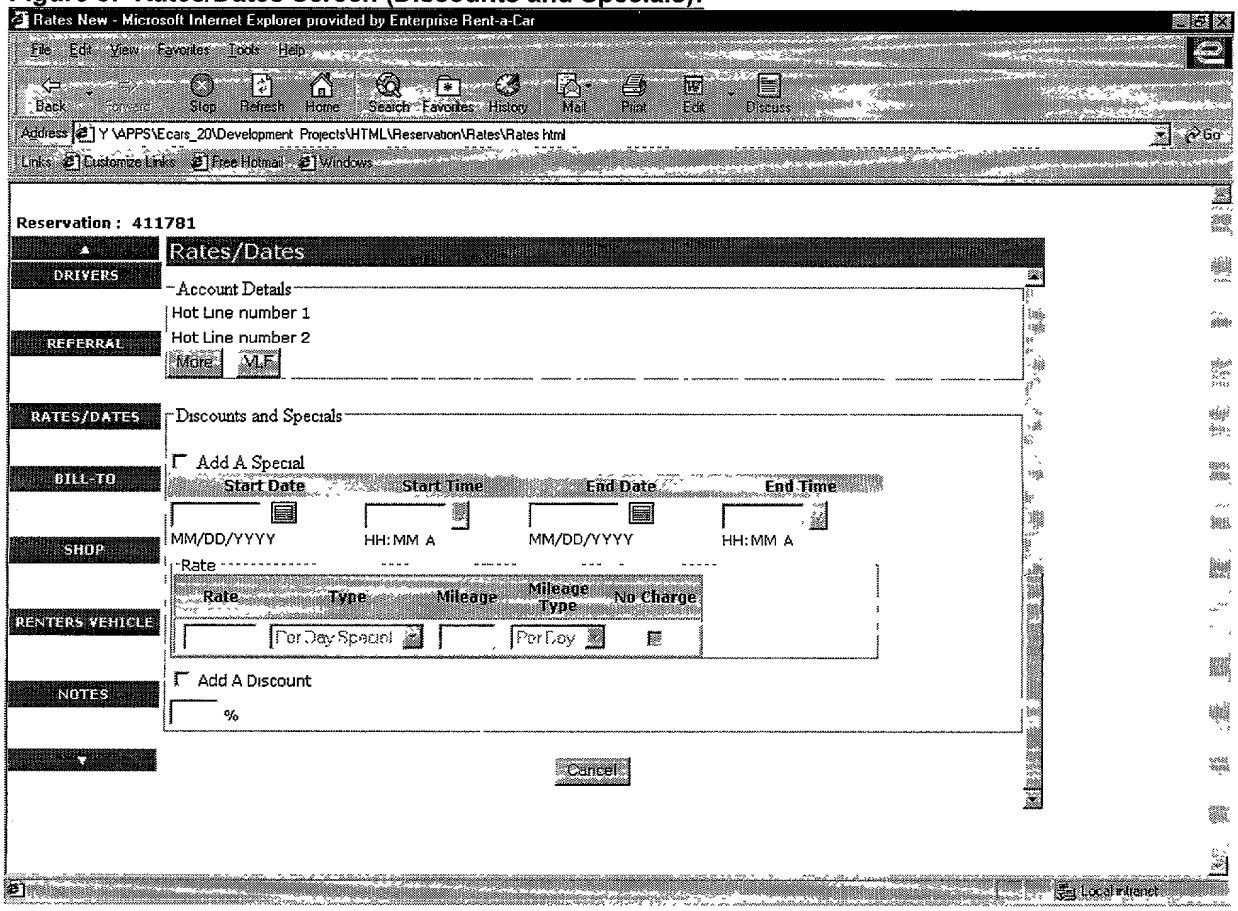
1.10.8 CDW

- There are no edit business rules associated with this field in reservation.

1.10.9 PAI

- There are no edit business rules associated with this field in reservation.

Figure 5: Rates/Dates Screen (Discounts and Specials):



1.11 Discounts and Specials

1.11.1 Add a special

If add a special is unchecked then start date, start time, end date, end time, special rate and mileage remains but the information is ignored by the system.

1.11.2 Start date

- If start date is changed, the system will validate that the start date is not after the end date.
- If there is a pick up date and the user changes the special start date to a date before the pick up date, the system will inform the user that the start date cannot be before the pick up date.
- If there is no pick up date, and the user changes the special start date to a date before the current date, the system will inform the user that the start date cannot be before the current date.

- If the start date is deleted, the system will display a message that a start date must be specified for a special.
- If the start date is in the past but the field has not been touched during edit, the system will not validate the date in this field.
-

1.11.3 End date

- If the end date is changed the system will validate that the end date is not before the start date and provide a message if it is.
- If there is a return date, then the special end date cannot be after the return date, otherwise the system will display a message that the special end date must be equal to or before the return date entered.
- If the end date is deleted, the system will display a message that an end date must be specified for a special.
- If the end date is in the past but the field has not been touched during edit, the system will not validate the date in this field.
-

1.11.4 Start Time

- No business rule for deleting the start time of a special.

1.11.5 End time

- No business rule for deleting the end time of a special.

1.11.6 Rate

- No business rule for deleting the rate on a special.

1.11.7 Type

- There is no validation on changing the type.

1.11.8 Mileage

- There is no validation on changing or deleting the mileage for a special.

1.11.9 Mileage Type

- There is no validation on changing the mileage type.

1.11.10 No charge

- If there is a mileage charge on the reservation there must be a mileage charge for the special.
- If there is no mileage charge on the reservation there can't be a mileage charge on the special.

1.11.11 Add a discount

- If the add a discount box is unchecked when editing, the discount percent remains but is ignored by the system.
- If the discount box is checked when editing, a discount must be entered.

1.11.12 Discount Percent

- The discount amount can't be changed to over 50% or less than 1%, otherwise the system will inform the user as such. (Discounts must be entered in whole numbers).

1.12 Bill-to Screen

1.12.1 If the user decides to remove an account as a bill-to account, this is the way the app should behave:

- If the user blanks out the account name and tabs off or leaves the field, the Account Number and Contact should also be blanked out.
- If the user blanks out the account number and tabs off or leaves the field, the Account Name and Contact should also be blanked out.

1.13 Shop/Vehicle Screen

1.13.1 If the user decides to remove an account as a referral, this is the way the app should behave:

- If the user blanks out the account name and tabs off or leaves the field, the Account Number and Contact should also be blanked out.
- If the user blanks out the account number and tabs off or leaves the field, the Account Name and Contact should also be blanked out.

1.14 ARMS

1.14.1 Protected Fields in ARMS

- If the reservation originated from the ARMS system there are certain fields that will be protected/(not editable by the user). They are as follows:

1. Claim/POL/PO Number
2. Claim Type (C, I, T)
3. Insured's Name
4. Auth By
5. Direct Bill (Y, N)
6. % Auth (*not a requirement for Res Pilot*)
7. Max Days Authorized
8. Max Billable Amount
9. Policy Max Amount
10. Daily Max Amount
11. Date of Loss
12. Bill-To Start Date
13. Bill-To End Date (Auth until Date)
14. Number of Days Authorized(*not a requirement for Res Pilot*)
15. Daily Rate Authorized
16. Tax Authorized (Y, N)
17. Car class Authorized
18. Cancellation Date (Last Day Date)
19. Bill-To Account Number (Except if root only is entered then protected once full account number is entered)

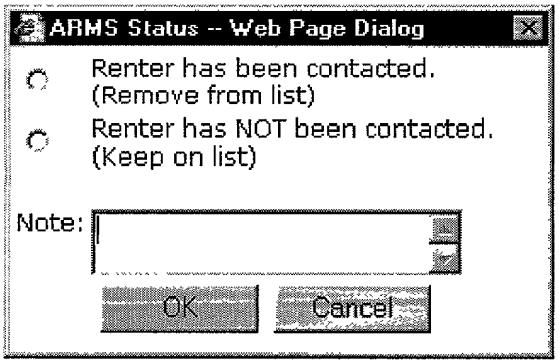
1.14.1.1 Editable Fields in ARMS:

(Note: The following editable fields for ARMS reservations follow the same edit rules as the non-arms reservations that were covered above in Driver)

- Driver Last Name
- Driver First Name
- Hm Phone
- Work Phone
- Extension
- Other Phone
- Phone Description
- Driver's Address
- Zip
- County
- City
- State
- Other Address
- Employer
- License Number
- Expiration Date
- State Issued
- DOB
- SSN
- Height
- Weight
- Hair Color
- Eye Color

1.14.2 ARMS Indicator

ARMs Reservation Modal Dialog Box



This modal dialog box will appear whenever a user chooses to complete an ARMS reservation and the status of the reservation is either "Not Contacted" or "Contact Attempted ".

Upon initial display of the dialog box, the radio button will default to "Renter has been contacted. (Remove from list)".

If "Renter has been contacted" is selected and the user chooses "OK", the system will do the following things:

- The status of reservation will be changed to "Contacted"
- A note will be added to the Reservation notes with the following text, "Renter has been contacted."
- If the user has entered any text into the "Notes" text area, the entered text will be added to the reservation notes as a second note. If no text is entered, A note should not be generated.

NOTE: Each of the notes generated will be captured like any other system-generated note and given a note type of "Reservation". See the System Generated notes Supplemental Spec.

If "Renter has Not been contacted is selected and the user chooses "OK", the system will do the following things:

- The status of reservation will be changed to "Contact Attempted"
- A note will be added to the Reservation notes with the following text, "Attempted to contact Renter."
- If the user has entered any text into the "Notes" text area, the entered text will be added to the reservation notes as a second note. If no text is entered, a note should not be generated.

NOTE: Each of the notes generated will be captured like any other system-generated note and given a note type of "Reservation". See the System Generated notes Supplemental Spec.

If the user chooses to cancel, the system will return the user back to the reservation where the user initially selected to complete the reservation. No changes will be made to the reservation status and no notes will be generated. If the user tries to complete again, the dialog box will display again .

1.15 NATRES

1.15.1.1 Protected Fields in Natres

- A Branch employee cannot edit a National Reservation originated reservation. If a National Reservation is selected for editing by a branch employee, all fields for the Reservation are view only.
- (See Enhancement #1080 – Ability to Edit Natres Reservations).

1.16 Completing after Editing information

- Saving an edited reservation follows the same business rules as saving a created reservation and the same validations occur and informational messages and error messages will display upon committing the edited information to the database.

1.17 Void

1. ARMS and NATRES reservations may not be voided by branch personnel.
2. An outside group cannot void branch reservations for a group other than the owning group of the physical terminal signed onto by the user.
3. For branch reservations, void must be available to the user on all reservation screens.
4. The system must confirm to the user that a reservation is being voided.
5. The void option should only be available once a reservation has been saved and retrieved for edit.
6.

Basic Flow:

1. User A accesses Reservation 123456.
2. The system opens Reservation 123456 to User A.
3. The system locks Reservation 123456 for User A immediately.
    a. If User B tries to access Reservation 123456, the use case continues at Alternative Flow (Reservation Locked).
    b. If User A's id is used again to access Reservation 123456 on a second terminal, the use case continues at Alternative Flow (Stealing Record Lock).
    c. If User A has the Reservation 123456 open more than 30 minutes.
    d. If User B makes updates to Reservation 123456 in Legacy while A has the Reservation open in GUI, the use case continues at alternative flow (Legacy to GUI Sync).
4. If User A completes the reservation in less than 30 minutes and they have continually updated the reservation at least every 4 minutes and 59 seconds the system will save the updates and release the logical lock on the transaction at the database.
5. If after 30 minutes, User B accesses Reservation 123456 and views, edits or saves the reservation, the use case continues at Alternative Flow (30 Minute Lock Released).

Alternative Flows:

6. Reservation Locked.
    a. User B tries to gain access to Reservation 123456.
    b. The system displays a Lock Warning Screen (File in Use) that informs the user of the following information:
        i. A message that the reservation is in use and locked by another employee.
        ii. Employee Number of the person who has the reservation locked for editing.
        iii. The user's Group Branch that has the reservation locked for editing. (For Retrofit)
        iv. The user's name that has the reservation locked for editing. (For Retrofit)
    c. The User has the option to either Cancel or View Reservation 123456 Read Only.
        i. If User B cancels, the user is returned to where they tried to enter the reservation from and the use case ends.
        ii. If User B chooses to Read Only, User B can read the reservation but will not be able to edit any of the fields.

7. Stealing Record Lock
    a. User A's id is used again to access Reservation 123456 on a second terminal.
    b. Both terminals have simultaneous lock on the reservation.
    c. Whichever terminal saves first wins and releases the record lock.
    d. *For retrofit, User A will not be able to steal record lock from self.*

8. 30 Minute Lock Released
    a. After 30 minutes, the system releases the record lock
    b. User B accesses Reservation 123456
    c. User B updates Reservation 123456.

d. The system saves Reservation with User B's updates.
e. When User A tries to save Reservation 123456 after User B has already saved it, the system will display a message that the reservation has been updated and ask if they would like to view the updated version.

8.5 30-Minute Lock Released but Not Accessed by User B.
a. After 30 minutes, the system releases the record lock.
b. No other users access Reservation 123456.
c. User A attempts to save Reservation 123456.
d. System locates User A's dormant ID as last locked ID.
e. System saves Reservation 123456 to User A.

9. Legacy to GUI Sync.
a. During the time User A has Reservation 123456 open in GUI, User B accesses Reservation 123456 in Legacy. (User B, in Legacy, is not locked out)
b. User B updates and saves to reservation 123456.
c. System initiates sync between GUI and Legacy.
d. Record updated in Oracle.
e. Lock is released
f. User A attempts to complete Reservation 123456 and the system will display a message that the reservation has been updated and ask if they would like to view the updated version.

Note: One Record Lock message needed for pilot. Additional Record Lock messages will be used in Retrofit.

Special Edit Rules

1. The following rules apply for the editing of all date fields:
When editing a reservation if the date for any date field is not added, deleted or changed the field is not validated by the system.
If a date in a date field is changed, added or deleted then the system will validate those fields upon leaving the screen in the same way as validated when creating a reservation.
These rules apply to all date fields in reservation.

2. When a user opens a NatRes, voided or closed reservation, or a reservation attached to a ticket, a popup window will appear immediately after the reservation is opened. The message will tell the user that changes made to this reservation cannot be saved. The Complete button will be disabled on all screens. The Complete option will be removed from the menu bar for this transaction. The Transfer and Void options will be removed from the title bar option control.

3. 3. Voided reservations, reservations attached to open tickets and closed reservations (reservations attached to closed tickets) cannot be searched for and do not appear on the Reservation Summary screens. These reservation may only be viewed by entering the reservation number in Reservation Fast Path.

Post-Conditions

1.19 < Post-condition One >

Extension Points

1.20 <Name of Extension Point>

ECARS 2.0
Supplemental Specification: Hot Keys

Version 1.1

Do not duplicate or distribute

Revision History

Date	Version	Description	Author
8/22/01	1.0	First Draft	Mike Pallia
10/25/01	1.1	Added Germany hot key values	M. Pallia

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Supplemental Specification

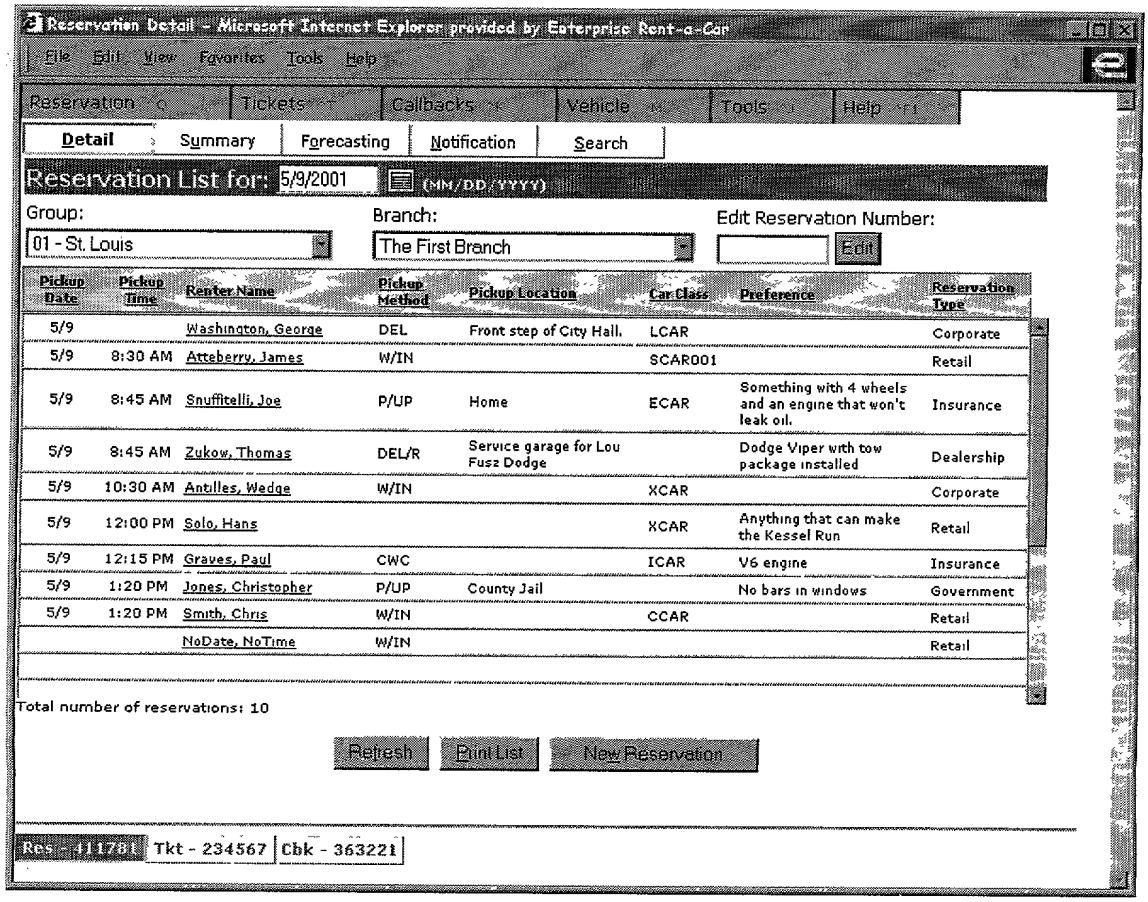
1. Hot Keys

The purpose of this document is to identify every hot key within each screen of a Reservation

1.1 US English Screens

1.1.1 Detail Screen

The reservation detail screen is used to determine what reservations will be coming in for a specific day. The user will refresh this list frequently to keep it updated.



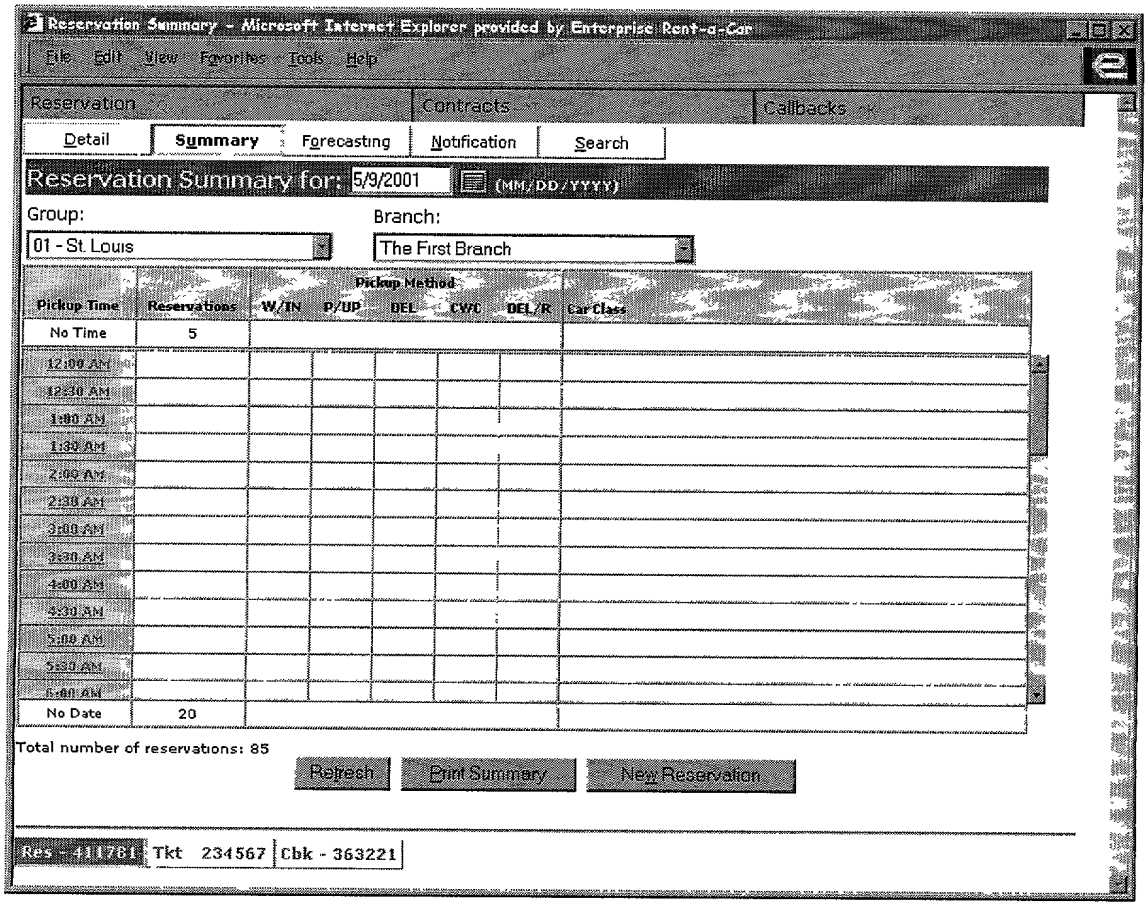
The Hot Keys that apply to this screen are:

Text Label	North America	Germany	Purpose of button
Refresh	F	K	Re-submits the page to get the most current data
Print List	P	D	Prints all the records in the summary list
Edit	E	B	Is in regard to changing an existing reservation
Detail	D	A	Navigates the user to the Reservation Detail Screen
Summary	U	Z	Navigates the user to the Reservation Summary Screen

Forecasting	O	O	Navigates the user to the Reservation Forecasting screen
		N	
Search	S	S	Navigates the user to the Reservation Search Screen
New Reservation	W	U	This button is used when a user wants to create a new reservation for a potential customer.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.2 Summary Screen

The Reservation summary screen is used to determine how many reservations are coming into the branch during a specific ½ hour period for a specific day.



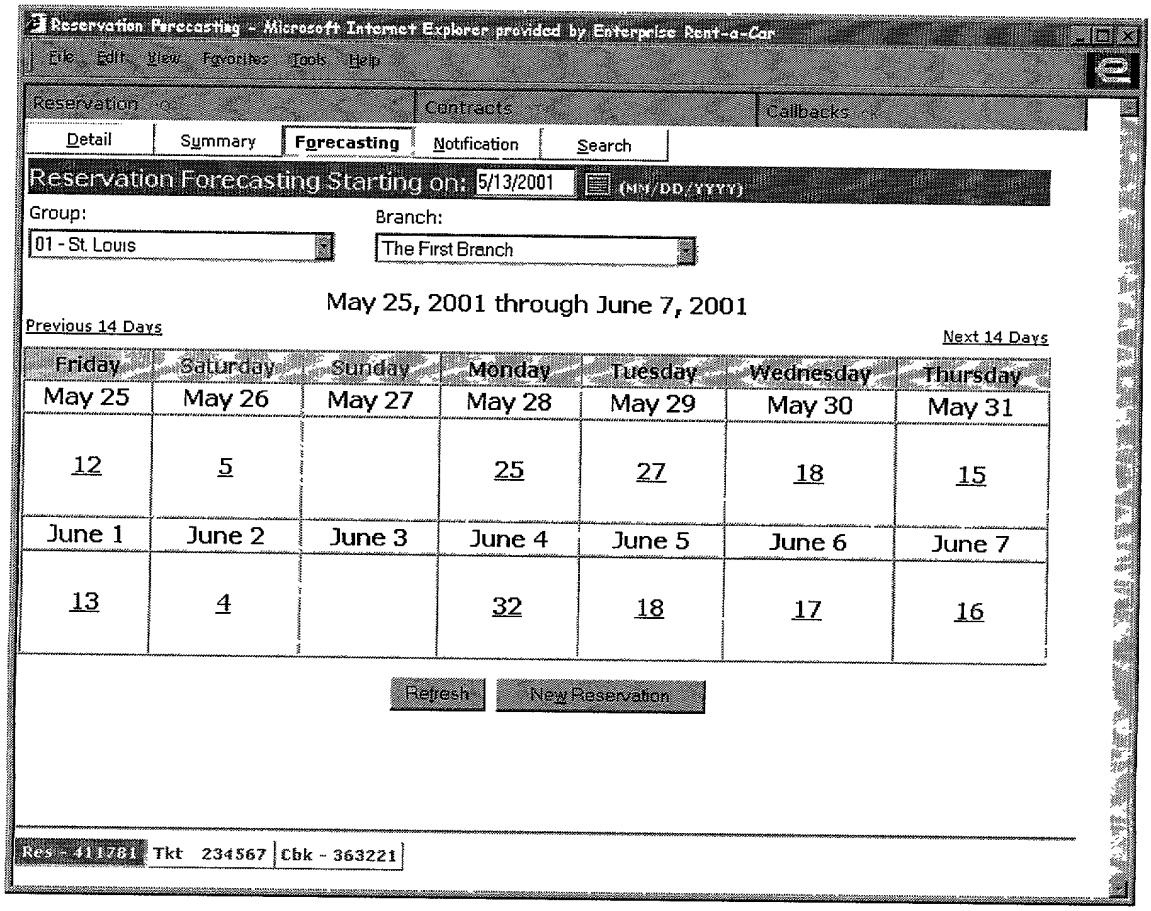
The Hot Keys that apply to this screen are :

Text Label	North America	Germany	Purpose of button
Refresh	F	K	Re-submits the page to get the most current data
Print Summary	P	D	Prints the entire day of ½ hour intervals because all the ½ hour intervals may not be visible on the screen
Detail	D	A	Navigates the user to the Reservation Detail Screen
Summary	U	Z	Navigates the user to the Reservation Summary Screen
Forecasting	O	O	Navigates the user to the Reservation Forecasting screen
		N	
Search	S	S	Navigates the user to the Reservation Search Screen
New Reservation	W	U	This button is used when a user wants to

			create a new reservation for a potential customer.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.3 Forecasting Screen

The Reservation forecasting screen is used to determine how many reservations are booked for a particular day within a 14-day period.



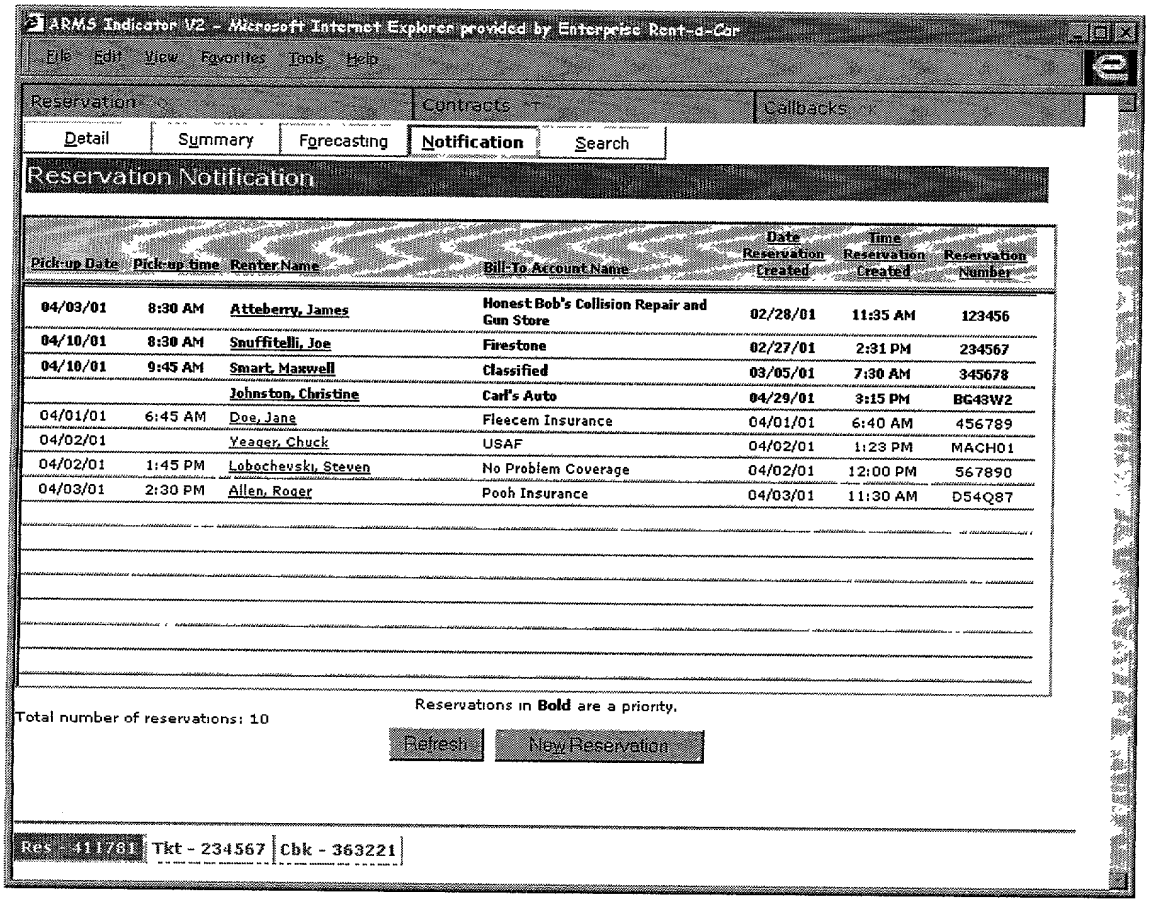
The Hot Keys that are available to the user are:

Text label	North America	Germany	Purpose of button
Refresh	F	K	Re-submits the page to get the most current data
Detail	D	A	Navigates the user to the Reservation Detail Screen
Summary	U	Z	Navigates the user to the Reservation Summary Screen
Forecasting	O	O	Navigates the user to the Reservation Forecasting screen
		N	
Search	S	S	Navigates the user to the Reservation Search Screen
New Reservation	W	U	This button is used when a user wants to create a new reservation for a potential customer.
Transaction 1	1	1	Navigates the user to the first open

			transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.4 Notification Screen

The Reservation Notification screen is used to show the user the reservations that need to be confirmed immediately.



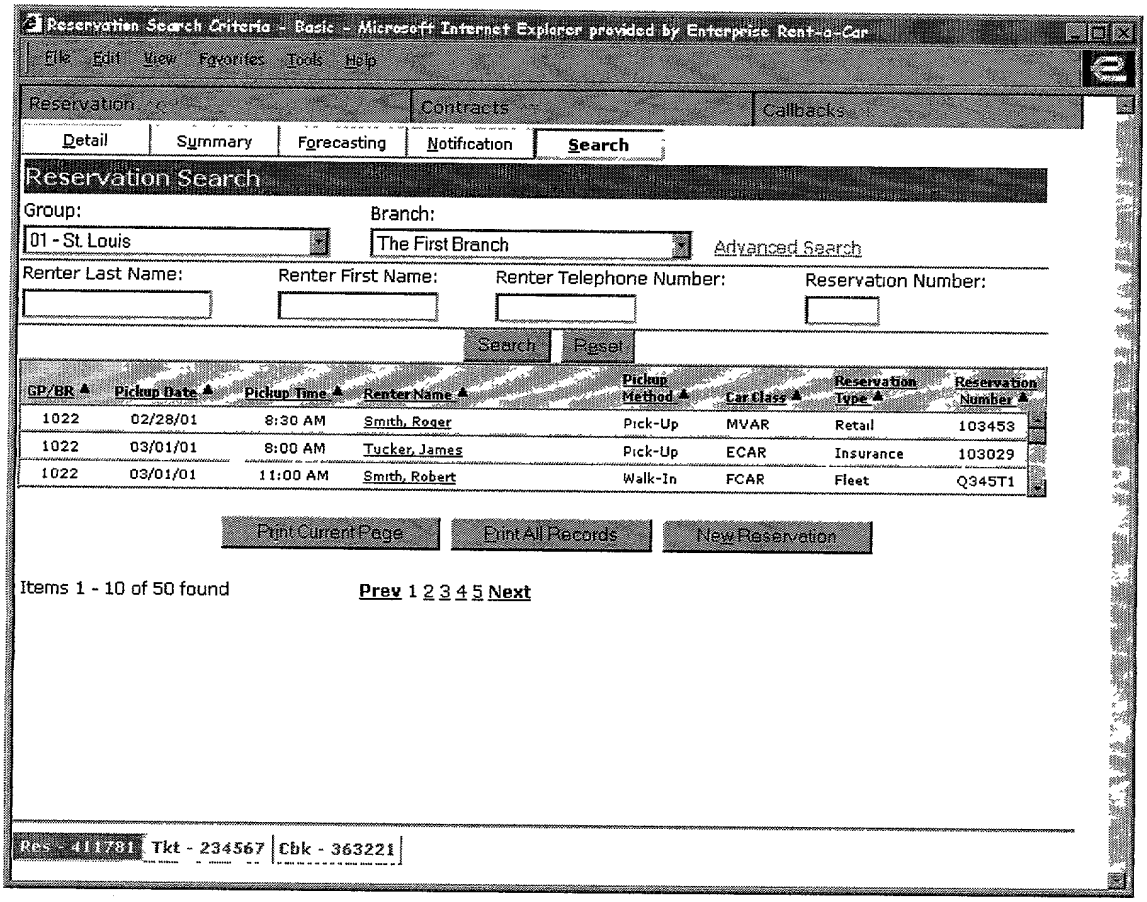
The hot keys that are available to the user are:

Text label	North America	Germany	Purpose of button
Refresh	F	K	Re-submits the page to get the most current data
Detail I	D	A	Navigates the user to the Reservation Detail Screen
Summary	U	Z	Navigates the user to the Reservation Summary Screen
Forecasting	O	O	Navigates the user to the Reservation Forecasting screen
		N	

Search	S	S	Navigates the user to the Reservation Search Screen
New Reservation	W	U	This button is used when a user wants to create a new reservation for a potential customer.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.5 Search Screen

The search screen allows the user to locate a specific reservation by entering specific criteria.



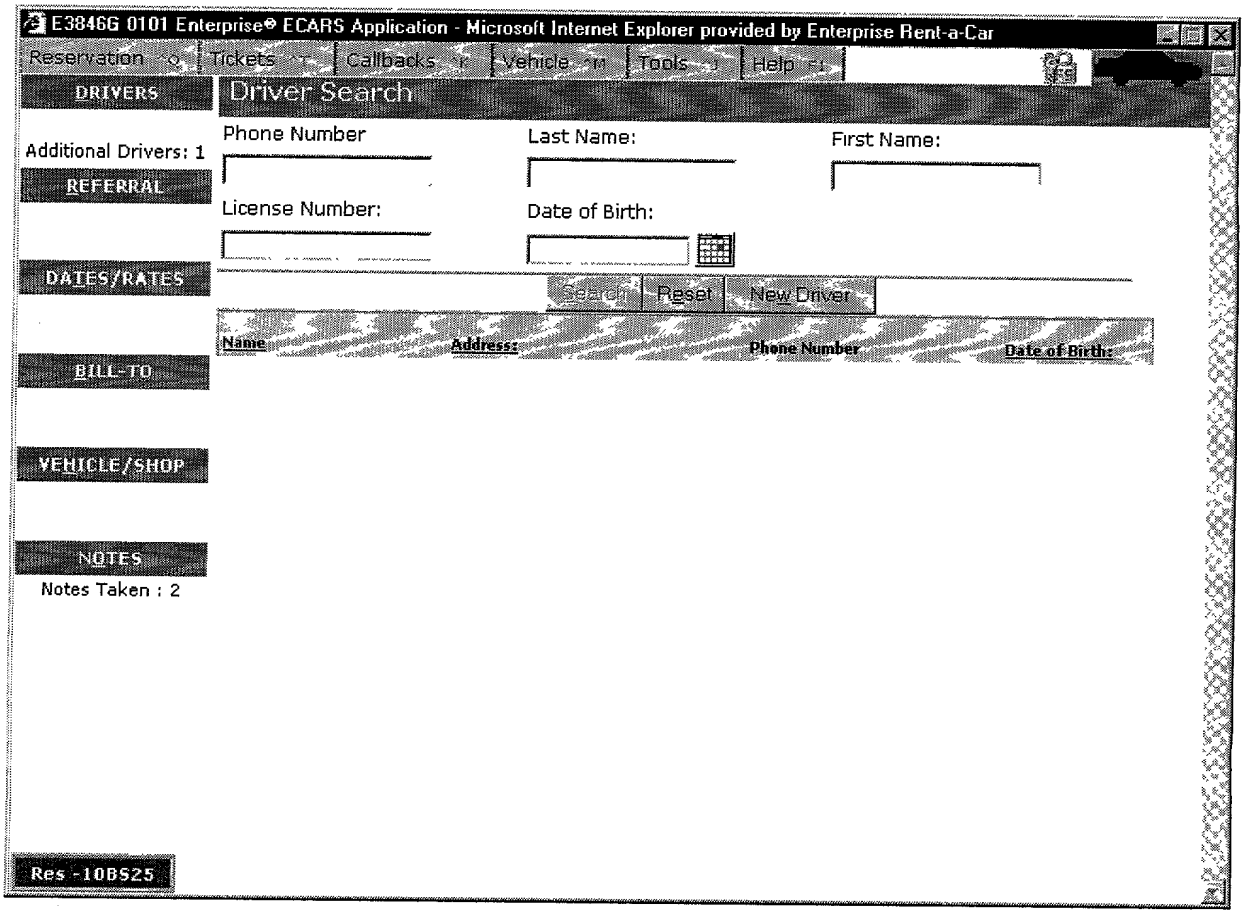
The Hot Keys that are available to the user are:

Text label	North America	Germany	Purpose of Button
Reset	E	Ü	Clears the data out of all the fields
Print Current Page	I	T	Since a search can return more than 1 page of results, this will print only the current page that is displayed to the user

Print List	P	D	Prints all the records found regardless of the number of pages
Detail	D	A	Navigates the user to the Reservation Detail Screen
Summary	U	Z	Navigates the user to the Reservation Summary Screen
Forecasting	O	O	Navigates the user to the Reservation Forecasting screen
		N	
Search	S	S	Navigates the user to the Reservation Search Screen
New Reservation	W	U	This button is used when a user wants to create a new reservation for a potential customer.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.6 Driver Search Screen

This screen is used to find a repeat renter's information to add to a reservation transaction. The user searches by the criteria listed and will pick one of the repeat renters returned from the search. If the user does not find the renter they are looking for, they will use the New Driver button to start a reservation without any renter information pre-filled.

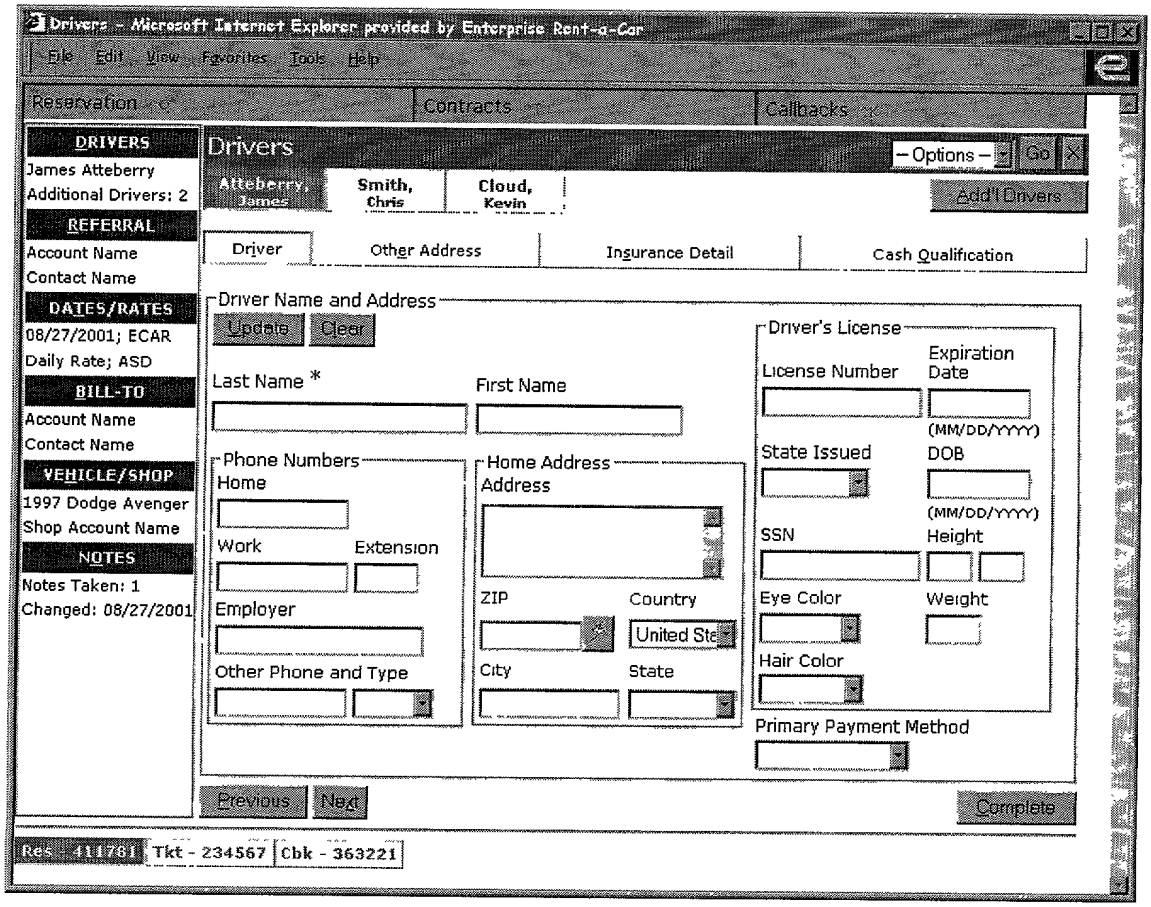


The Hot keys available to the user are :

Text label	North America	Germany	Purpose of Button
Reset	E	Ü	Clears the data out of all the fields
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes screen
New Driver	W	U	Navigates the user to the Drivers screen with no renter data populated
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.7 *Driver Screen*

This screen is used to fill in all the data about a renter. The user can enter more than one renter. When the user needs to add an additional driver to a reservation, they will use the "Add'l drivers" button to create another instance of the driver screens.



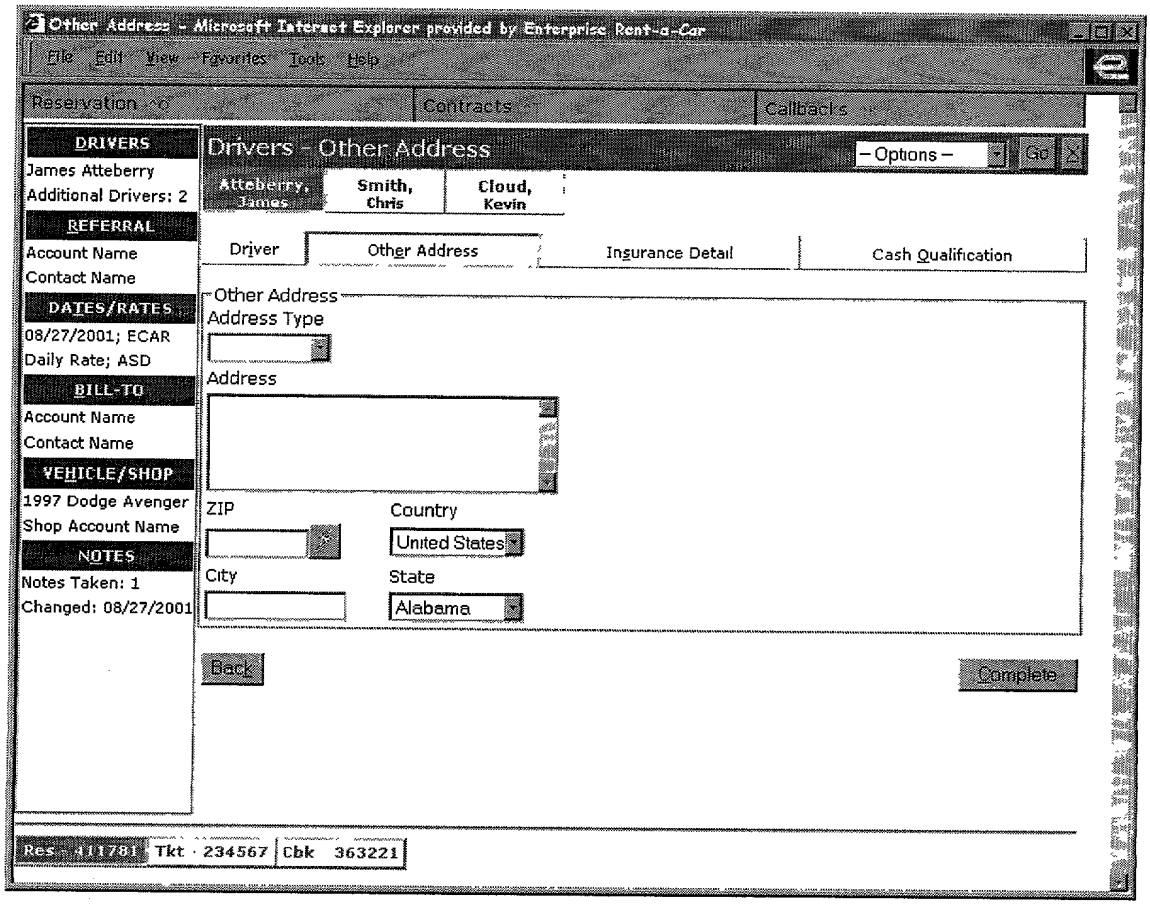
The Hot Keys available to the user are:

Text label	North America	Germany	Purpose of Button
Add'l Drivers	A	E	Used to add more than one driver to a reservation
Update	U	Ä	If the user has to update a Repeat renter's data.
Clear	L	L	Used to clear all the driver data fields at once.
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen

Notes	O	O	Navigates the user to the Notes screen
Next	N	B	Navigates the user to the next main area within the transaction navigation bar
Complete	C	G	Saves the transaction
Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Driver	I	H	Navigates the user to the Driver screen when the user might be working on more than one driver
Other Address	E	A	Navigates the user to the Other Address screen for the current driver (if more than one)
Cash Qualification	Q	Ü	Navigates the user to the cash qualification screen for the current driver (if more than one)
Insurance Detail	S	S	Navigates the user to the Insurance Detail screen for the current driver (if more than one)
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.8 *Other Address, Cash Qualification, Insurance Detail Sub-Screens*

These screens are used to capture additional data about a Driver. The other address allows the user to enter a second address for a renter. The cash qualification screen provides additional data areas to underwrite a driver that may not have a credit card. The insurance detail screen provides an area for the user to capture the details of the Driver's Personal Car Insurance.



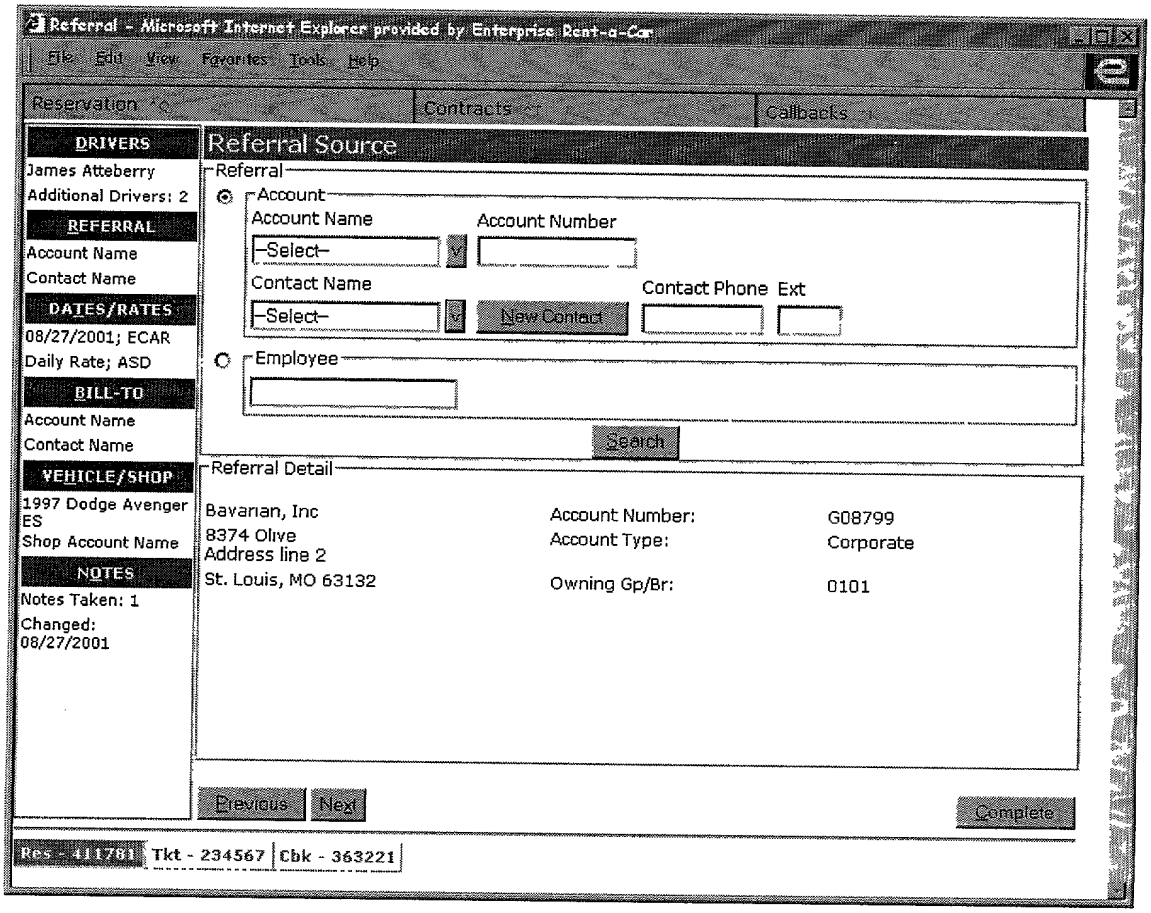
The Hot Keys available to the user on each of the sub-screens are:

Text label	North America	Germany	Purpose of Button
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes screen
Back	B	K	Navigates the user back to the Driver Screen for the current driver (if there are more than one)
Complete	C	G	Saves the transaction

Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Driver	I	H	Navigates the user to the Driver screen when the user might be working on more than one driver
Other Address	E	A	Navigates the user to the Other Address screen for the current driver (if more than one)
Cash Qualification	Q	Ü	Navigates the user to the cash qualification screen for the current driver (if more than one)
Insurance Detail	S	S	Navigates the user to the Insurance Detail screen for the current driver (if more than one)
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.9 Referral Screen

This screen is used to capture the data of who referred the renter to Enterprise. This can be either an Enterprise Account or Enterprise Employee.



The Hot Keys available to the user are:

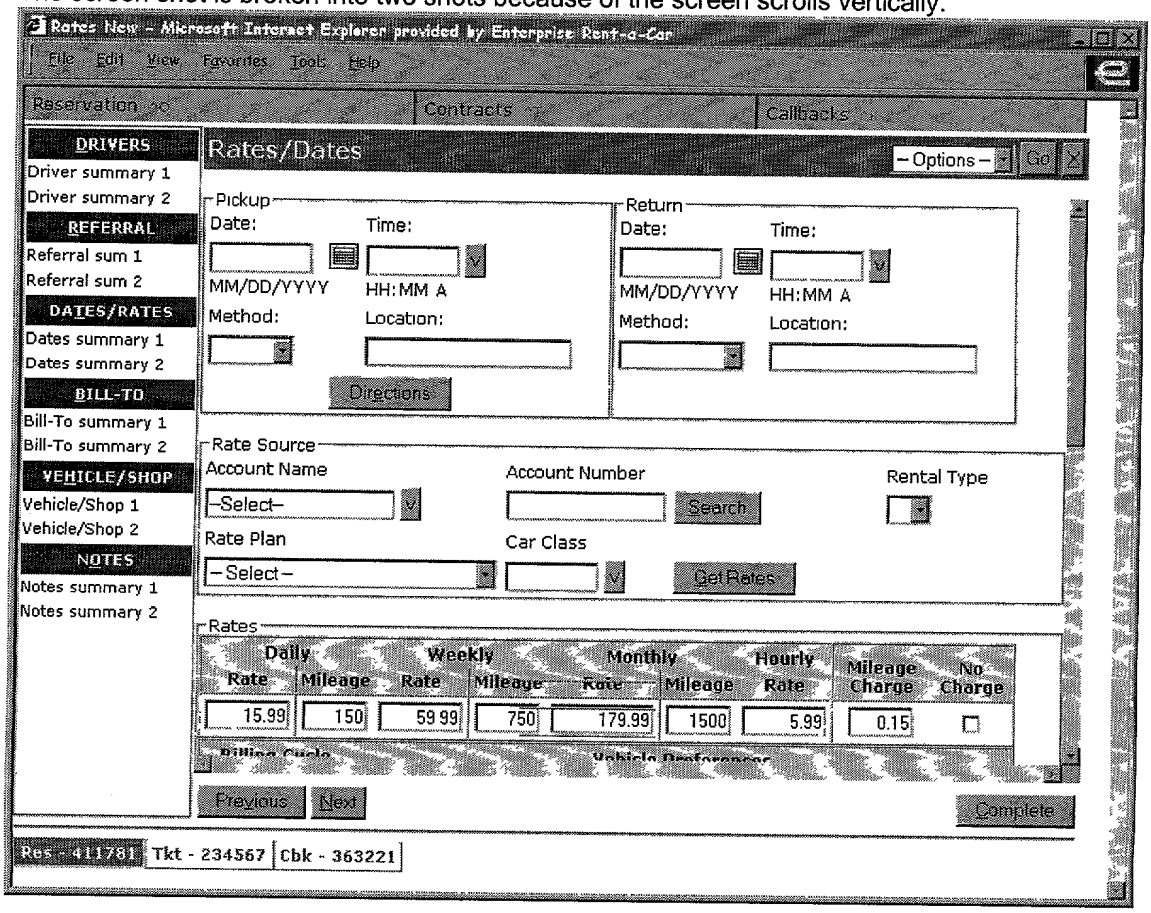
Text label	North America	Germany	Purpose of Button
Search	S	S	Navigates the user to the account or employee search screen
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes screen
Previous	V	V	Navigates the user to the previous main area within the transaction navigation bar
Next	N	N	Navigates the user to the next main area within the transaction navigation bar

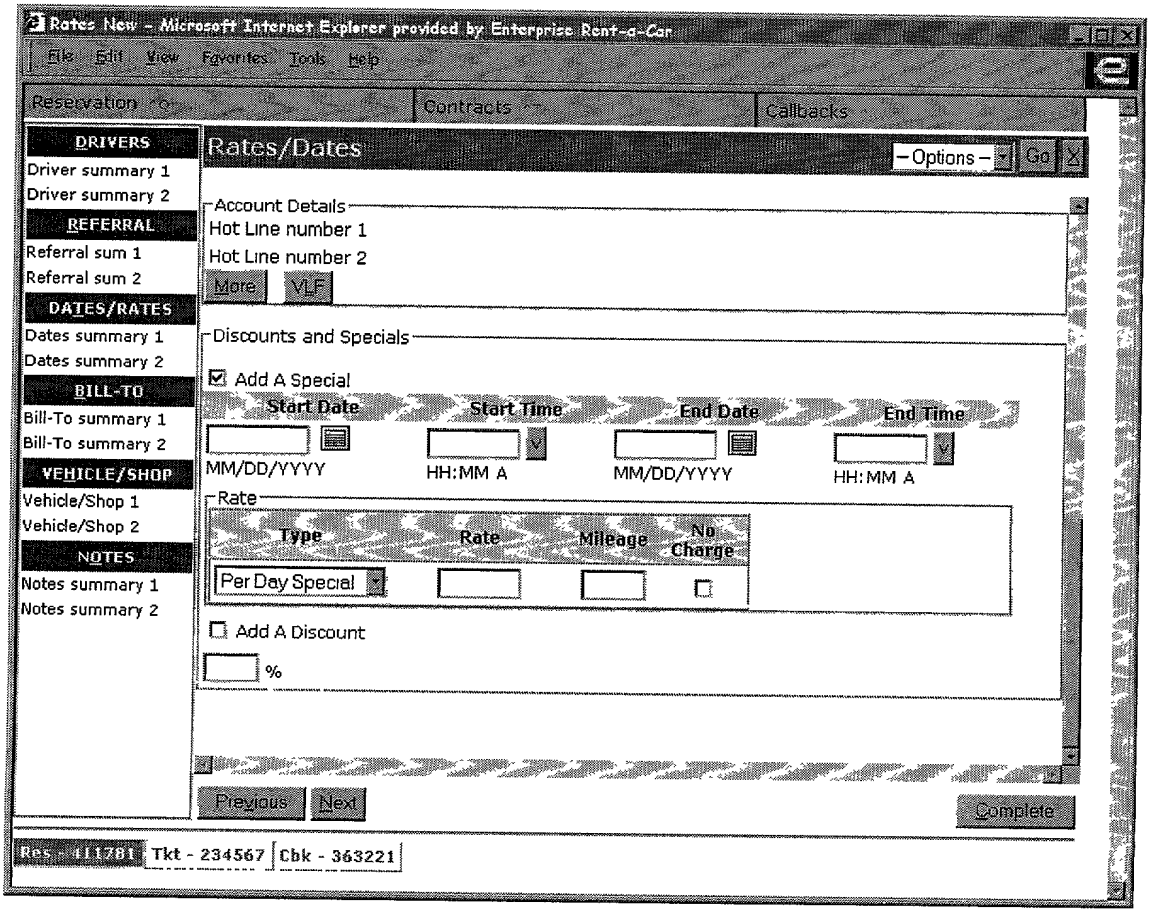
Complete	C	G	Saves the transaction
Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.10 *Dates/Rates Screen*

This screen is used to capture all the particulars of a reservation. This includes Pick-up date, Return Date and allows the user to search for a rental rate for the reservation. This screen handles any additional product or fees that are associated to the rate or pick-up location.

The screen shot is broken into two shots because of the screen scrolls vertically.





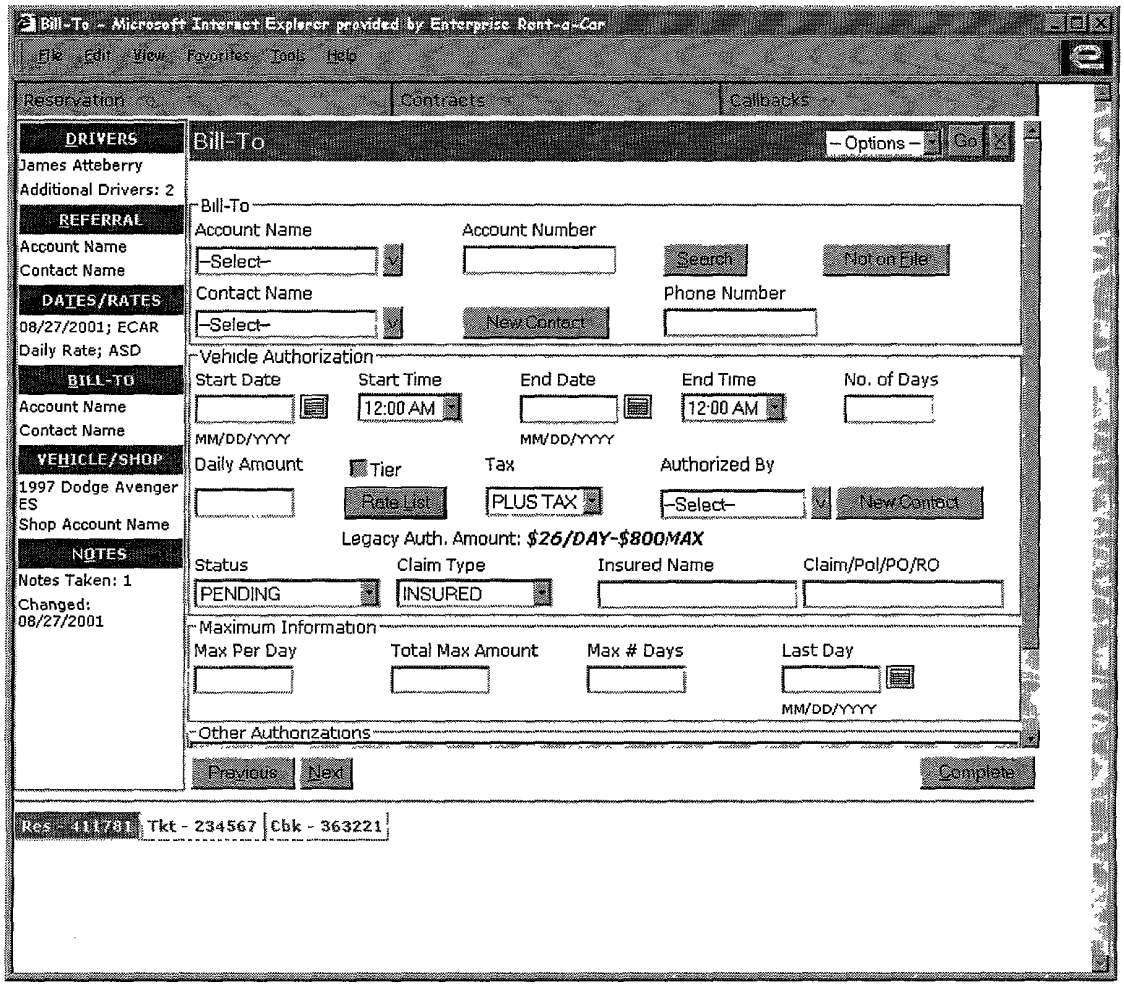
The hot keys available to the user are:

Text label	North America	Germany	Purpose of Button
Search	S	S	Navigates the user to the Account search screen
Directions	E	B	Allows the user to enter directions to the pick-up location
Get Rates	G	Z	Tells the system to go look for any rental car rates that are set up for the Account chosen as the rate source.
VLF	L	I	Displays the table of Vehicle License fees. VLF is a tax that is applied to rentals in the states of California and Hawaii only.
More	M	M	Navigates the user to a screen that displays all the rate source account's information.
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen

Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes screen
Previous	V	V	Navigates the user to the previous main area within the transaction navigation bar
Next	N	N	Navigates the user to the next main area within the transaction navigation bar
Complete	C	G	Saves the transaction
Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.11 Bill-to Screen

This screen is used to capture the information about an account that is authorizing Enterprise to bill them for some portion or the entire rental.



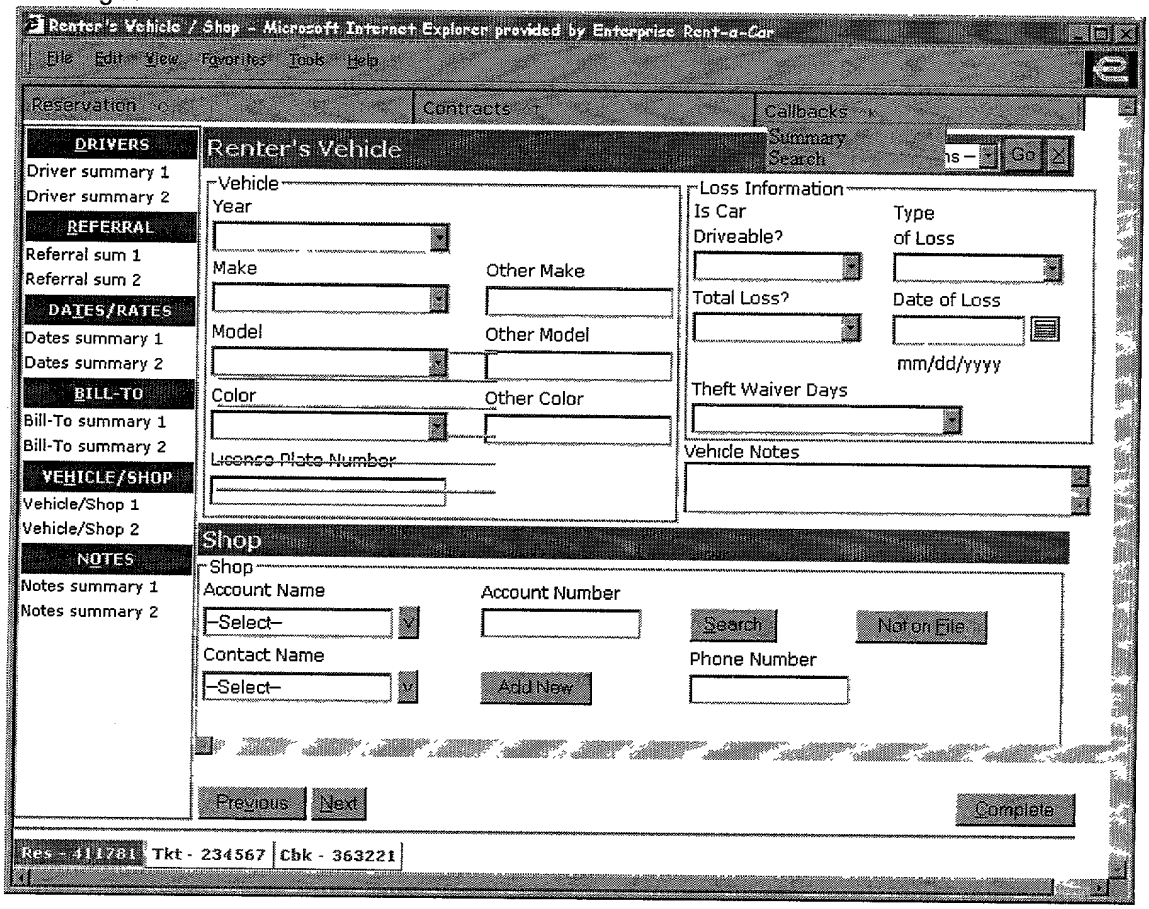
The hot keys available to the user are:

Text label	North America	Germany	Purpose of Button
Search	S	S	Navigates the user to the Account Search screen
Not On File	F	D	Allows the user to create a new bill-to account if the account cannot be located in the account database.
Rate List	L	L	Shows the rates of the account that is selected as the Bill-to
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates

			screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes screen
Previous	V	V	Navigates the user to the previous main area within the transaction navigation bar
Next	N	N	Navigates the user to the next main area within the transaction navigation bar
Complete	C	G	Saves the transaction
Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.12 *Vehicle/Shop Screen*

This screen is used to capture data about the Renter personal vehicle and data about the shop that will be fixing it.



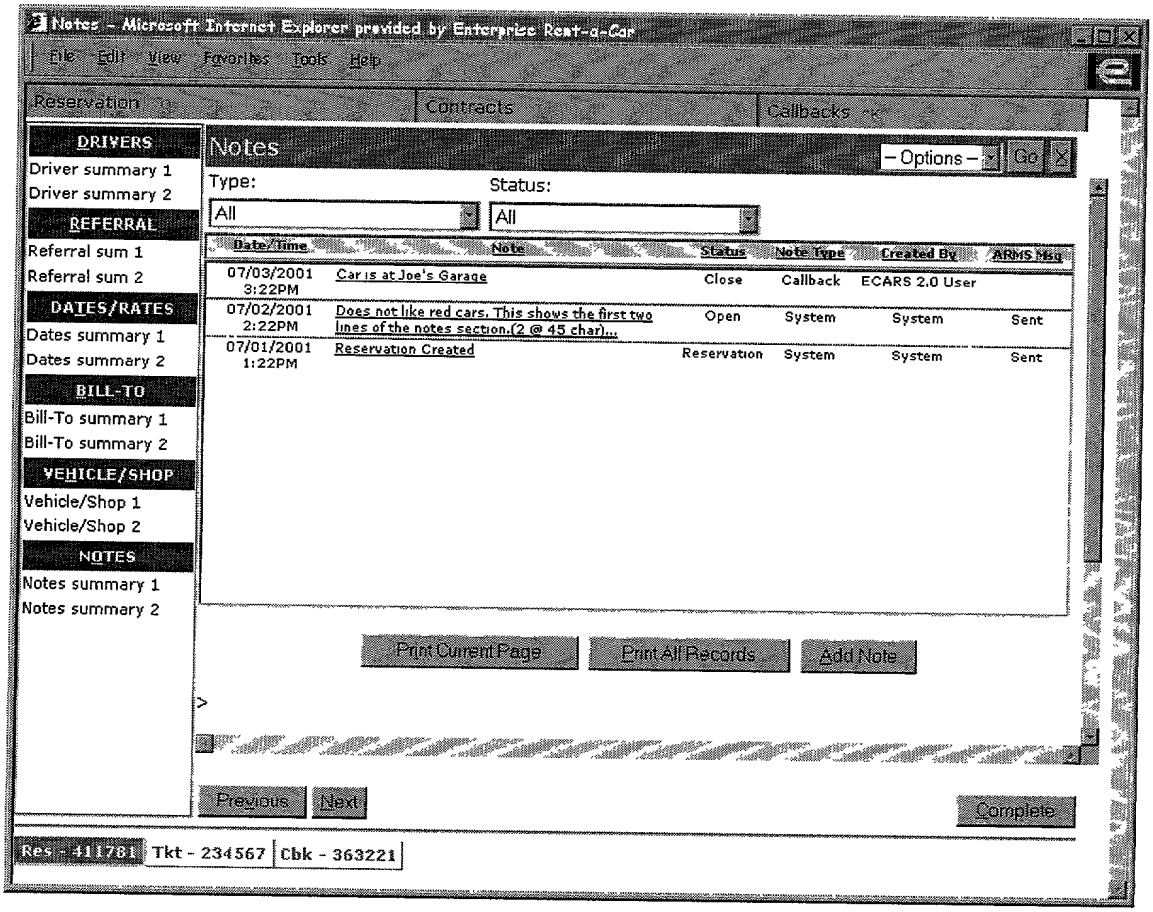
The hot keys available to the user are:

Text label	North America	Germany	Purpose of Button
Search	S	S	Navigates the user to the Account Search screen
Not On File	F	D	Allows the user to create a new bill-to account if the account cannot be located in the account database.
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes screen
Previous	V	V	Navigates the user to the previous main area within the transaction navigation bar

Next	N	N	Navigates the user to the next main area within the transaction navigation bar
Complete	C	G	Saves the transaction
Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

1.1.13 Notes

This screen is used to log any miscellaneous information about a reservation that isn't captured on the other screens.



The hot keys available to the user are:

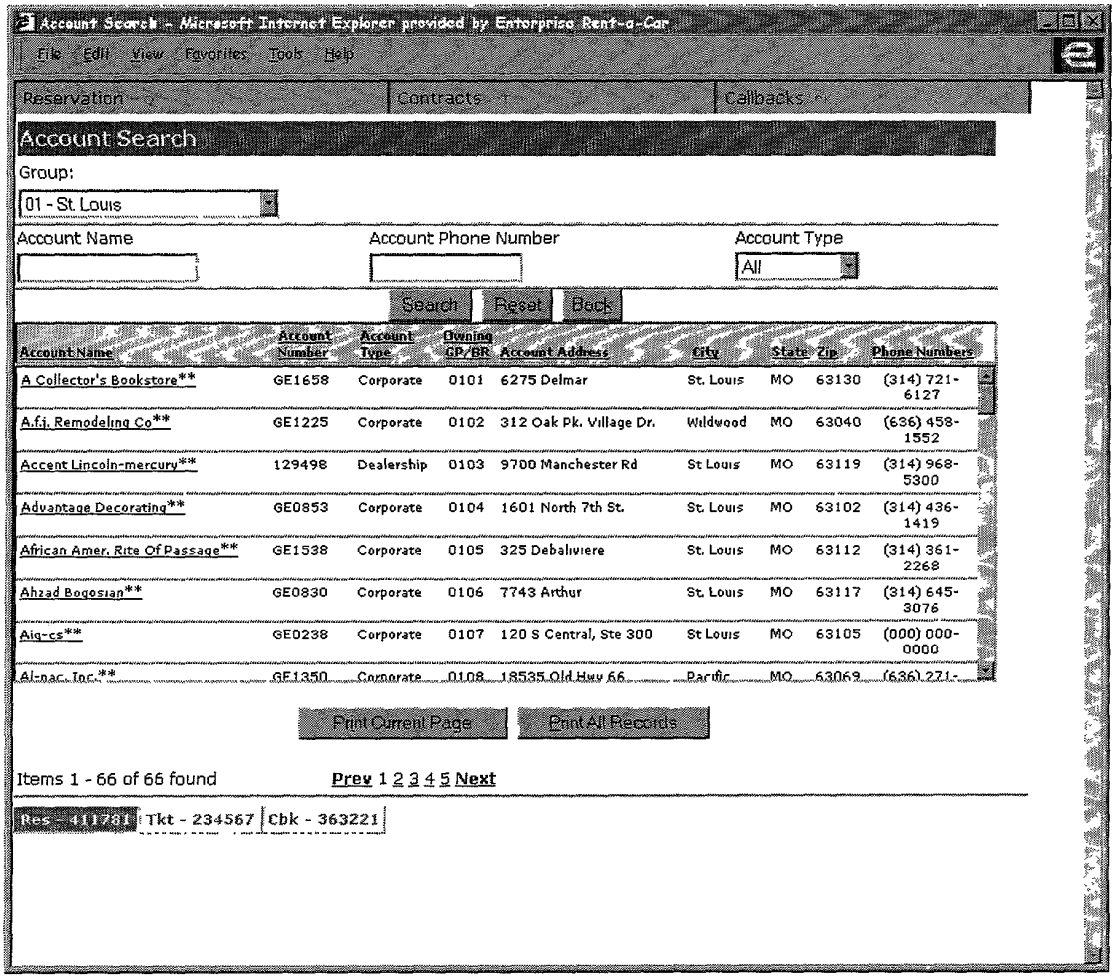
Text label	North America	Germany	Purpose of Button
Print All Records	P	D	Prints all notes that have been saved regardless of what is displayed on the screen
Add Note	A	Z	Allow the user to enter a text note.
Drivers	D	A	Navigates the user to the Driver screen
Referral	R	W	Navigates the user to the Referral screen
Dates/Rates	T	P	Navigates the user to the Dates/Rates screen
Bill-to	B	R	Navigates the user to the Bill-to screen
Vehicle/Shop	H	F	Navigates the user to the Vehicle/Shop screen
Notes	O	O	Navigates the user to the Notes

			screen
Previous	V	V	Navigates the user to the previous main area within the transaction navigation bar
Next	N	N	Navigates the user to the next main area within the transaction navigation bar
Complete	C	G	Saves the transaction
Exit "X"	X	X	This is used to exit the transaction that the user is working on. No data will be saved from the point when the user last saved.
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

Do not duplicate or distribute

1.1.14 Account/Employee Search

This screen is used when a specific account or employee needs to be located and used as a Referral, Bill-to, Rate Source or Shop.



The hot keys available to the user are:

Text label	North America	Germany	Purpose of Button
Reset	E	Ü	Clears the data out of all the fields
Cancel	A	A	Returns the user to the screen where the user initiated the search
Transaction 1	1	1	Navigates the user to the first open transaction
Transaction 2	2	2	Navigates the user to the second open transaction
Transaction 3	3	3	Navigates the user to the third open transaction

ECARS 2.0
Supplemental Specification: Error Messages

Version 1.4

Translation History

Date	Version	Description	Author
09/06/01	1.0	First Draft	M. Pallia
9/18/01	1.1	Reworked the tables to include a validation on and implemented column.	M. Pallia
9/20/01	1.2	Re-work the tables to include all validation as was determined in the screen specs.	M. Pallia
9/24/01	1.3	Includes all the changes the users recommended	M. Pallia
10/24/01	1.4	Document includes German Translations	M. Pallia
11/29/01	1.5	Updated error dialog screenshots	James Atteberry

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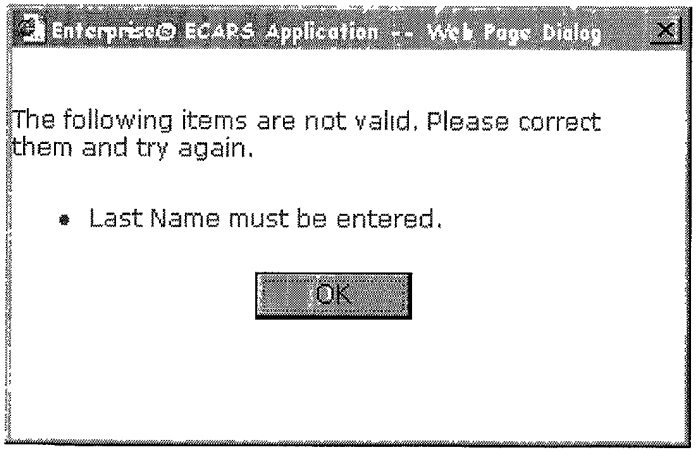
Supplemental Specification

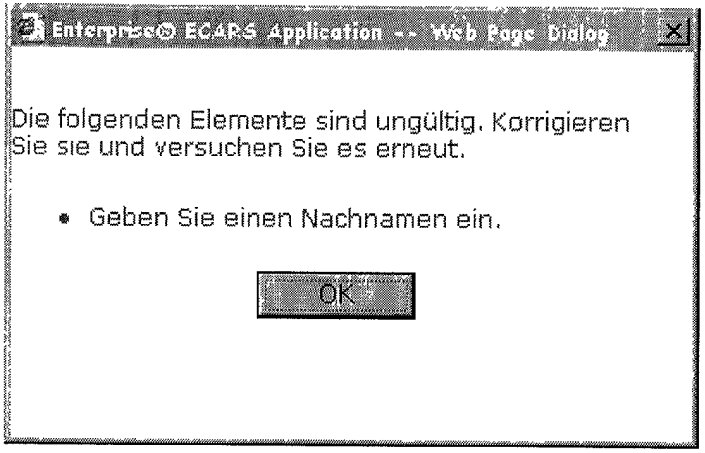
1. Error Messages

This document explains the text and events that trigger a feedback message in the Reservation Sub-Application. This will also serve as the standards for field level validation errors.

2. Error Message Screen

All validation messages to the user will be displayed in the following form:





3. System Exceptions

System exceptions will not be displayed to the user whenever possible. If they are, these will be the error messages that will be displayed.

Event	Message	Translation German
If the exception crashes the app.	System Level Error. Please call help desk if error continues.	Fehler auf Systemebene. Wenden Sie sich an die Hilfezentrale, wenn der Fehler weiterhin besteht.
If the system has a null-pointer error which does not crash the app.	System Level Error. Please hit CMD 5 to refresh the page.	Fehler auf Systemebene. Drücken Sie CMD 5 zur Aktualisierung der Seite.

4. Field Validation Errors

These errors should be consistent across all sub-apps within the system and are specific to certain field types.

4.1 Date Fields

Event	Message	Translation German
User enters an invalid date	“Field name” does not contain a valid date.	"Field Name" enthält kein gültiges Datum.

4.2 Time Fields

Event	Message	Translation German
User enters an invalid time	“Field name” does not contain a valid time.	"Field Name" enthält keine gültige Zeit.

4.3 Phone Number Fields

4.3.1 North America

Event	Message	Translation German
User enters a phone number that has more or less than 10 numeric characters	"Field Name" must be 10 characters.	"Field Name" muss zehn Zeichen umfassen.
User enters a phone number that has text in it.	"Field Name" may contain numeric characters only	"Field Name" darf lediglich numerische Zeichen enthalten.

4.3.2 UK, Ireland, Scotland, Germany

Event	Message	Translation German
User enters a phone number that has more than 13 characters in it.	“Field Name” cannot contain more than 13 characters	"Field Name" darf nicht mehr als dreizehn Zeichen enthalten.
User enters a phone number that does not have a special character between the area code and phone number.	“Field Name” has an invalid phone number format	"Field Name" enthält ein ungültiges Telefonnummern-Format.

4.4 Numeric fields

Event	Message	Translation German
User enters non-numeric characters into a numeric only field	“Field Name” must contain numeric characters only.	"Field Name" darf lediglich numerische Zeichen enthalten.

User enters a negative value	"Field Name" may not be a negative value.	"Field Name" darf keinen negativen Wert enthalten.
User enters more than 2 digits after a decimal	"Field Name" has too many digits after the decimal.	"Field Name" enthält zu viele Dezimalstellen.
User enters a decimal into a field that allows only whole number entries	"Field Name" must contain whole numbers only.	"Field Name" darf nur ganze Zahlen enthalten.
User enters a number that is too large	"Field Name" is too large. Please enter a smaller value.	"Field Name" ist zu groß. Geben Sie einen kleineren Wert ein.

4.5 Transaction area

Event	Message	Translation German
User attempts to open or view a 4th transaction	Only 3 transactions can be opened at one time.	Nur drei Transaktionen können gleichzeitig geöffnet sein.

5. Log In Errors

Event	Message	Translation German
User enters an invalid User name or Password.	Invalid User Name/Password Verify the CAPS LOCK function is off.	Ungültiger Benutzername/ungültiges Passwort. Stellen Sie sicher, dass die FESTSTELLTASTE nicht eingerastet ist.
User when changing their password enters an invalid password.	Your password must be at least six characters in length or Password matched one of five previous passwords.	Ihr Passwort muss mindestens sechs Zeichen umfassen und darf nicht mit einem der fünf letzten Passwörter übereinstimmen.
User when verifying their new password, do not match.	The passwords you typed do not match. Re-submit your request.	Die von Ihnen eingegebenen Passwörter stimmen nicht überein. Versuchen Sie es erneut.
If any of the required fields are not entered.	Enter data into all of the fields.	Machen Sie in allen Feldern Angaben.
This displays after 3 failed attempts to log on to the application.	Security Access Denied.	Zugang aus Sicherheitsgründen abgelehnt.
User password has expired	Password Expired. Enter New Password	Passwort abgelaufen. Geben Sie ein neues Passwort ein.
For some reason the system does not recognize the user.	You have been locked out of the system. Contact your designated network administrator.	Sie sind vom System ausgeschlossen worden. Wenden Sie sich an Ihren zuständigen Netzwerkadministrator.
The user's enter info is not confirmed by the	Authentication Failed. Re-submit your request.	Authentifizierung fehlgeschlagen. Versuchen

system for any reason.		Sie es erneut.

6. Business Rule Validation Errors

These errors occur when a specific business rule is not met. These will be handled individually page by page.

6.1 Reservation Search

Event	Message	Translation German
The user enters a Date Reservation taken that is greater than the current date	Date Reservation Taken cannot exceed Today's date.	Das Datum der Reservierungsaufnahme darf nicht nach dem heutigen Datum liegen.
The user enters a pick-up date to that is prior to the Pick up date from	End Date range must be after Start Date.	Der Bereich des Enddatums muss nach dem Startdatum liegen.

6.2 Reservation Detail

Event	Message	Translation German
The user refreshes with the branch area blanked out	You must select a Branch.	Wählen Sie eine Filiale.
The user refreshes with the Date area blanked out	You must enter a Date.	Geben Sie ein Datum ein.
The user refreshes with an invalid date entered (North American Version)	The date entered at the top of the screen is invalid. Please ensure date is in MM/DD/YYYY format.	Not Needed. This is North American version only
The user refreshes with an invalid date entered (UK Version)	The date entered at the top of the screen is invalid. Please ensure date is in DD/MM/YYYY format.	
The user refreshes with an invalid date entered (Germany Version)	The date entered at the top of the screen is invalid. Please ensure date is in TT/MM/JJJJ format.	

6.3 Reservation Summary

Event	Message	Translation German
The user leaves the branch area blank.	You must select a Branch.	Wählen Sie eine Filiale.
The user refreshes with the Date area blanked out	You must enter a Date.	Geben Sie ein Datum ein.
The user refreshes with an invalid date entered (North American Version)	The date entered at the top of the screen is invalid. Please ensure date is in MM/DD/YYYY format.	Not Needed. This is North American version only
The user refreshes with an invalid date entered (UK Version)	The date entered at the top of the screen is invalid. Please ensure date is in DD/MM/YYYY format.	
The user refreshes with an invalid date entered (Germany Version)	The date entered at the top of the screen is invalid. Please ensure date is in TT/MM/JJJJ format.	

6.4 Reservation Forecasting

Event	Message	Translation German
The user leaves the branch area blank	You must select a Branch.	Wählen Sie eine Filiale.
The user refreshes with the Date area blanked out	You must enter a Date.	Geben Sie ein Datum ein.
The user refreshes with an invalid date entered (North American Version)	The date entered at the top of the screen is invalid. Please ensure date is in MM/DD/YYYY format.	Not Needed. This is North American version only
The user refreshes with an invalid date entered (UK Version)	The date entered at the top of the screen is invalid. Please ensure date is in DD/MM/YYYY format.	
The user refreshes with an invalid date entered (Germany Version)	The date entered at the top of the screen is invalid. Please ensure date is in TT/MM/JJJJ format.	

6.5 Reservation Notification

None

6.6 Repeat Renter Search

Event	Message	Translation German
DOB is the only search criteria	Date of Birth cannot be the only search criteria. Enter at least one more criteria.	Das Geburtsdatum darf nicht das einzige Suchkriterium sein. Geben Sie mindestens ein weiteres Kriterium ein.
Last name is the only search criteria	Last Name cannot be the only search criteria. Enter at least one more criteria.	Der Nachname darf nicht das einzige Suchkriterium sein. Geben Sie mindestens ein weiteres Kriterium ein.

6.7 Driver Screen

Event	Message	Translation German
User completes or leaves screen without a Last Name	Last Name must be entered.	Geben Sie einen Nachnamen ein.
User enters an Other Phone number and no phone Type is specified	Phone Type must be selected if Other Phone Number is entered.	Wenn eine zusätzliche Telefonnummer eingegeben wird, muss der Telefonnummern-Typ gewählt werden.
User enters a License Number and does not enter a value for Date of Birth	Date of Birth must be entered if a License Number is specified.	Wenn eine Führerschein-Nummer genannt wird, muss ein Geburtsdatum eingegeben werden.
User enters a License Number and does not enter a value for Expiration Date	Expiration Date must be entered if a License Number is specified.	Wenn eine Führerschein-Nummer genannt wird, muss ein Gültigkeitsdatum eingegeben werden.
User enters a License Number and does not enter a value for State Issued	State Issued must be selected if a License Number is specified.	Wenn eine Führerschein-Nummer genannt wird, muss der Ausstellungsort ausgewählt werden.
User enters a License Number and does not enter a value for Country Issued	Country Issued must be selected if a License Number is specified.	Wenn eine Führerschein-Nummer genannt wird, muss das Ausstellungsland eingegeben werden.

User enters an Expiration Date that is prior to the current day	Drivers License is Expired.	Führerschein ist ungültig.
Date of Birth is under 18 years of age	Driver is under 18. Do Not Rent.	Fahrer ist unter 18 Jahre alt. Nicht vermieten.
Date of Birth is from 18 to 20 years of age	Driver is 18 to 20 years old.	Fahrer ist zwischen 18 und 20 Jahre alt.
Date of Birth is from 21 to 24 years of age	Driver is 21 to 24 years old.	Fahrer ist zwischen 21 und 24 Jahre alt.
Driver's Date of Birth is 70 or over	Driver is 70 or older.	Fahrer ist 70 oder älter.

6.8 Other Address Screen

None

6.9 Cash Qualification Screen

None

6.10 Insurance Detail Screen

Event	Message	Translation German
If any data is present in the following fields: Carrier, Policy Number, Expiration Date, Collision Deductible, Comprehensive Deductible, Liability, and Insurance Company Contact, the rest of the listed fields must have data as well.	"Field name" must be entered. (NOTE: each field that is not entered will be displayed and have its own error message)	"Field Name" muss eingegeben werden. (HINWEIS: Jedes Feld ohne Angabe wird mit einer eigenen Fehlermeldung angezeigt.)
Insurance Policy Expiration Date is prior to the current date	Insurance Policy is expired.	Versicherungspolice ist nicht mehr gültig.

6.11 Additional Driver screen

All the same validations as the Driver screen.

6.12 Referral Screen

Event	Message	Translation German
User selects an account, but does not select a contact	A Contact must be selected.	Ein Kontakt muss ausgewählt werden.
User enters an invalid account number	Account Number not found.	Kontonummer nicht gefunden.

6.13 New Contact

Event	Message	Translation German
The user hits add new contact button without entering any	A Contact Last Name and/or First Name must be	Für den Kontakt muss ein Nachname bzw.

data into Contact Last Name or Contact First Name	entered.	Vorname angegeben werden.

6.14 Account Search

Event	Message	Translation German
User attempts to initiate a search with Account type as "all" and Group as "all" as the only two search criteria	Requested search is too large. Please narrow search criteria.	Angeforderte Suche ist zu umfangreich. Schränken Sie die Suchkriterien ein.

6.15 Employee Search

None

6.16 Dates and Rates

Event	Message	Translation German
The user selects a pick-up date that is prior to the current date	Pick-up Date cannot be prior to Today's date.	Das Abholdatum darf nicht vor dem heutigen Datum liegen.
The user selects a time that is outside of the branch's operating hours.	Pick-up time is outside of branch operating hours.	Die Abholzeit liegt außerhalb der Öffnungszeiten der Filiale.
The user selects a time that is outside of the branch's operating hours.	Return time is outside of branch operating hours.	Die Rückgabezeit liegt außerhalb der Öffnungszeiten der Filiale.
The user selects a return date that is prior to the pick-up date	Return Date range must be after Pick-up Date.	Das Rückgabedatum muss nach dem Abholdatum liegen.
The user selects a pick-up date that is more than 13 months from the current date	Pickup date cannot be 13 months from today's date.	Das Abholdatum darf nicht dreizehn Monate nach dem heutigen Datum liegen.
A user enters an invalid account number	Account Number not found.	Kontonummer nicht gefunden.
No rate plans are returned after a user selects a rate source.	No rates found.	Keine Tarife gefunden.
A user enters a car class that is not valid	Car Class entered is Invalid.	Eingegebene Fahrzeugklasse ist ungültig.
A user selects a rate plan and car class and the car class has no rates	No rates found.	Keine Tarife gefunden.
A user selects a rate plan and no rates are set-up	No rates found.	Keine Tarife gefunden.
A user enters a special and does not select a billing cycle.	A billing cycle must be selected if a special is entered.	Bei Eingabe von besonderer Angaben muss ein Rechnungsmodus ausgewählt werden.
A user enters a special start date that is prior to the Reservation Pick-up date	Special Start Date cannot be prior to the Pick up Date.	Das Special-Startdatum darf nicht vor dem Abholdatum liegen.

A user enters a special start date that is prior to today's date and no pick-up date is entered	Special Start Date cannot be prior to Today's Date.	Das Special-Startdatum darf nicht vor dem heutigen Datum liegen.
User enters a Special start time that is before the current time.	Special Start Time cannot be prior to the current time.	Die Special-Startzeit darf nicht vor der aktuellen Uhrzeit liegen.
User enters a Special Start time that is before the pick-up time.	Special Start Time cannot be prior to the Pick-up Time	Die Special-Startzeit darf nicht vor der Abholzeit liegen.
If the user selects the "add special" check box, all of the following fields are required: Special Start Date, Special Start Time, Special End Date and Special End Time	"Field Name" must be entered. (NOTE: Each field that is not entered will be displayed and have its own error message)	"Field Name" muss eingegeben werden. (HINWEIS: Jedes Feld ohne Angabe wird mit einer eigenen Fehlermeldung angezeigt.)
A user enters an end date that is prior to the start date.	Special End Date range must be after Special Start Date.	Der Bereich des Special-Enddatums muss nach dem Special-Startdatum liegen.
A user enter an end date that is after the return date	Special End Date cannot exceed the Return Date.	Das Special-Enddatum darf nicht nach dem Rückgabedatum liegen.
User selects No Charge mileage for a special when the Rate Mileage is Limited	Special Mileage must be Limited Mileage if the Regular Mileage is Limited Mileage.	Wenn "Reguläre Kilometerzahl" auf "Begrenzte Kilometerzahl" lautet, muss auch "Special-Kilometerzahl" auf "Begrenzte Kilometerzahl" lauten.
User selects Limited mileage for a special when the Rate Mileage is No Charge	Special Mileage must be No Charge if the Regular Mileage is No Charge.	Wenn "Reguläre Kilometerzahl" auf "Keine Gebühr" lautet, muss auch "Special-Kilometerzahl" auf "Keine Gebühr" lauten.
User enters a discount rate that is larger than 50.	Discount Percentage cannot exceed 50%.	Der Nachlass in Prozent darf nicht über 50% liegen.

6.17 Bill-to Screen

Event	Message	Translation German
A user enters an invalid account number	Account Number not found.	Kontonummer nicht gefunden.
A user enters an account number that is not billable	This Account is not billable.	Für dieses Konto kann keine Rechnung erstellt werden.
A user selects a bill to account but no contact	A Contact must be selected.	Es muss ein Kontakt ausgewählt werden.
A user selects an Authorization Start date that is prior to the Pick-up Date	Authorization Start Date range cannot be prior to the Reservation PickUp Date.	Bereich für Startdatum der Genehmigung muss nach dem Abholdatum für die Reservierung liegen. Translation UK Authorisation Start Date range cannot be prior to the Reservation Pick-up Date.
A user selects an Authorization Start date that is after the	Authorization Start Date range cannot be later than	Bereich für Startdatum der Genehmigung darf nicht

Reservation Return Date	the Reservation Return Date.	nach dem Rückgabedatum für die Reservierung liegen. ****Translation UK. Authorisation Start Date range cannot be later than the Reservation Return Date.
A user selects an End date that is prior to the start date	Authorization End Date range must be after Authorization Start Date.	Das Enddatum der Autorisierung darf nicht nach dem Startdatum der Autorisierung liegen.
A user enters authorization dates and has not selected an authorization status of Authorized.	An Authorization Status of "Authorized" must be selected if Authorization Start or End Dates are entered.	Wenn Start- bzw. Enddatum der Autorisierung eingegeben werden, muss für den Autorisierungsstatus "Autorisiert" gewählt werden.
The user selects the rate list button an d no bill to account has been selected	A Bill-to account must be selected.	Ein Konto für Rechnungsstellung muss ausgewählt werden.
The user selects the rate list button and the bill-to account has no rate plans	No rates found.	Keine Tarife gefunden.
The user selects the rate list button and the rate plan selected has no rates	No rates found.	Keine Tarife gefunden.

6.18 Not On File Screen

Event	Message	Translation German
If data is entered into any of the following fields, the rest of the fields are required. The fields are: Name, Address, Zip, Phone, City, State, and Contact Last Name and/or Contact First Name.	"Field Name" must be entered. (NOTE: Each field that is not entered will be displayed and have its own error message	"Field Name" muss eingegeben werden. (HINWEIS: Jedes Feld ohne Angabe wird mit einer eigenen Fehlermeldung angezeigt.)

6.19 Vehicle/Shop

Event	Message	Translation German
User enters a date of loss that is after the current date.	Date of Loss must be equal to or prior to today's date.	Der Schadenstag muss dem heutigen Datum entsprechen oder davor liegen.

6.20 Notes

Event	Message	Translation German
User attempts to accept a note with no text entered.	Text must be entered.	Texteingabe erforderlich.

<ECARS 2.0 Reservation>
Use Case Specification: <Edit Branch/ARMS/NATRES and Void>

Version <1.0>
Draft

Revision History

Date	Version	Description	Author
<7/20/01>	<1.0>	<details>	<J. Gaines>

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3.1.1 Behavior: **Error! Bookmark not defined.**

3.1.2 Business Exceptions: **Error! Bookmark not defined.**

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3.2.1 Behavior: **Error! Bookmark not defined.**

3.2.2 Business Exceptions: **Error! Bookmark not defined.**

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Use Case Specification: <Edit Branch/ARMS/NATRES and Void>

Edit Branch/ARMS/NATRES and Void

1.1 Brief Description

This use case describes the edit process and field behaviors and dependencies when editing a branch reservation, an ARMS reservation and a NATRES reservation. Void rules for reservations are also included.

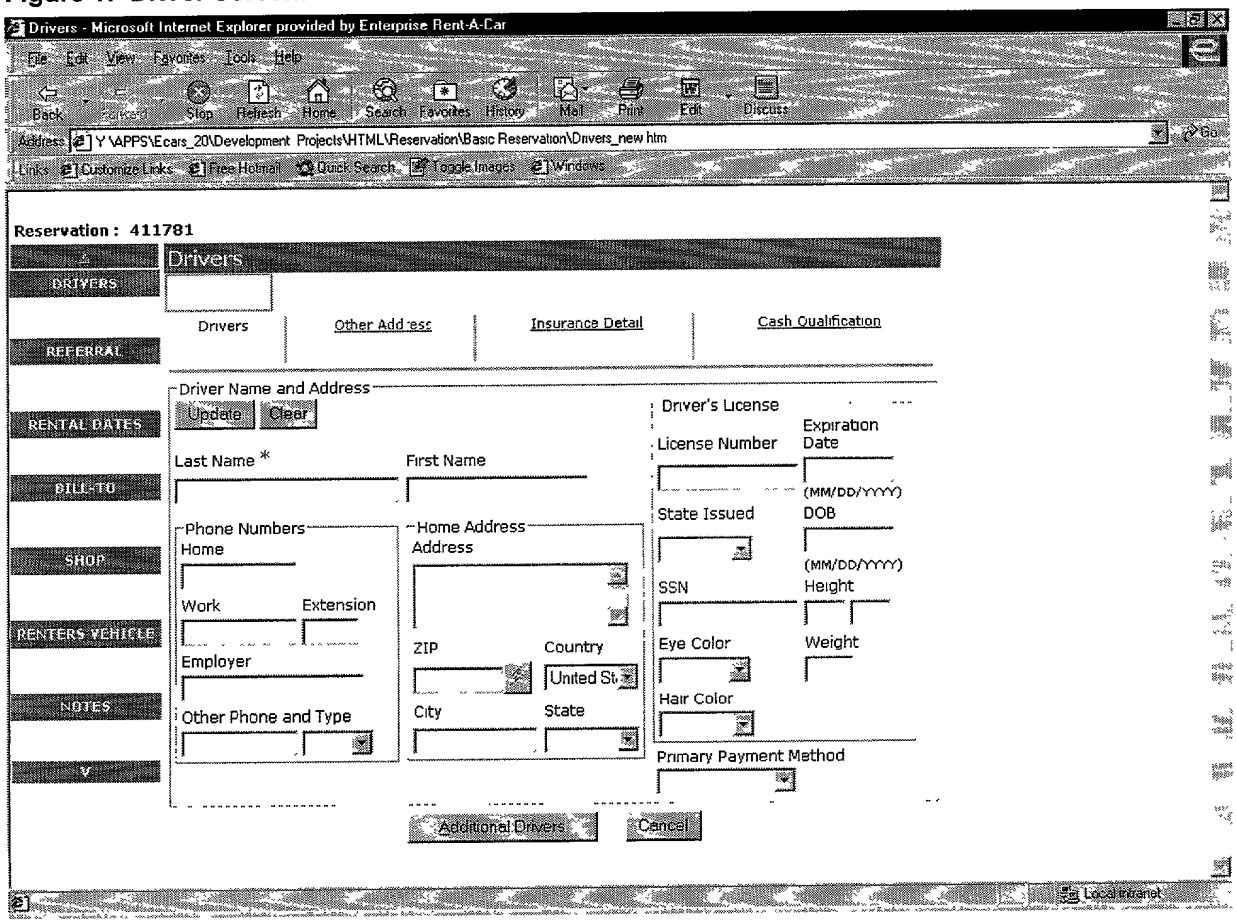
Pre-Conditions

1.2 The user can enter the reservation for editing from all points of entry into reservation.

1.3 The system is able to determine what kind of reservation the user is editing (branch, arms, natres, internet)

1.4 The system is able to determine whether a reservation is for the group of the physical terminal location or from another group.

Figure 1: Driver Screen:



Branch Reservation Edit

1.5 Update

- Update button will be removed.

1.6 Clear

- Clear button will be removed.

1.7 Driver Fields

1.7.1 Name:

- If last name is deleted, the user cannot save the reservation. No edit rules for first name in reservation.
- If the user selects Update and the driver's last name and/or first name is changed, no driver associated information fields are cleared.

1.7.2 Phone Numbers:

- If Work Number is deleted, the extension will blank out.
- If Other Phone is deleted, type will reset to blank.

1.7.3 Address:

- No edit rules for deleting or changing address in reservation.

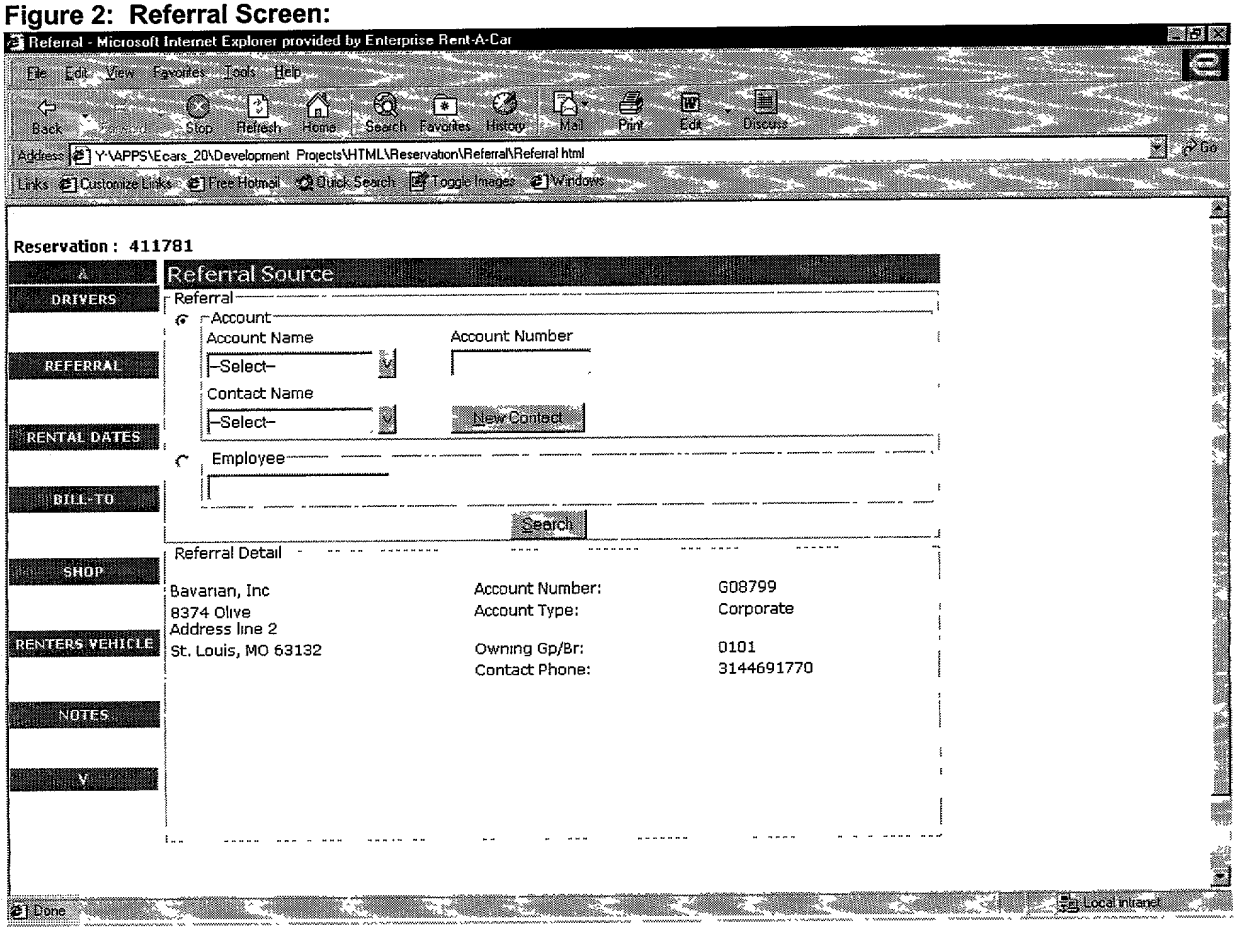
1.7.4 Driver's License Fields:

- If a driver's license number is added then the state issued, expiration date and DOB fields need to be entered as well.
- If a driver's license number is edited, none of the other license fields need to be changed or blanked out by the system.
- If any of the four driver's license fields are deleted, the other driver's license information that is entered remains, but upon saving the reservation, the system will alert the user to the missing piece(s) of driver's license information.

1.7.5 Primary Payment Method:

- No edit rules exist for changing primary payment method in reservation.

Figure 2: Referral Screen:



1.8 Referral Fields

1.8.1 Account Name:

- If account name is changed (to a valid account), account number will change appropriately and the contact name will now be "select".

1.8.2 Account Number:

- If account number is changed, the account name will change appropriately and the contact name

will now be "select".

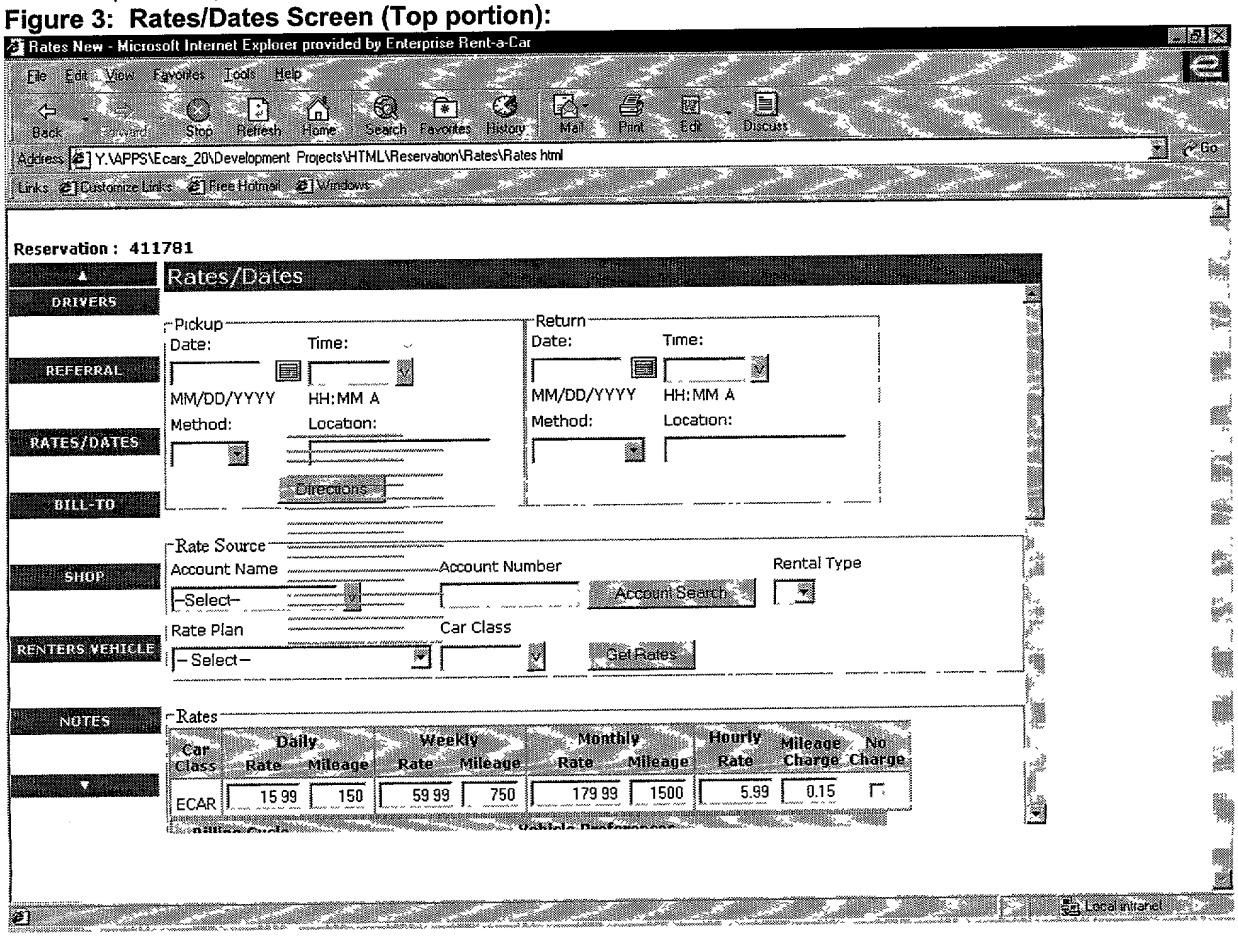
1.8.3 Employee Number:

- There are no edit rules for reservation on changing or deleting an employee number.

1.8.4 Contact Name

- If contact name is deleted, an error message will be displayed to the user to add a contact name upon complete reservation.

Figure 3: Rates/Dates Screen (Top portion):



1.9 Date Fields

1.9.1 Pick up Date:

If a pickup date/time already exists in a reservation:

- If the pick up date is deleted, the pick up time is also blanked.
- If the pick up date is changed, the new date follows the same rules for entering pickup date.
- If pick up date is entered and it is after the return date the user will receive an error message that pick up date is after the return date and the correction must be made by the user.

1.9.2 Pick Up Time:

- If the pickup time is changed, the new time must meet the same rules for entering pickup time.

1.9.3 Pickup Method:

- If the pick up method is changed, the location will remain.

1.9.4 Return Date:

If a return date/time already exists in a reservation:

- If the Return date is deleted, the return time is also blanked.
- If the return date is changed, the new date follows the same rules for entering return date.
- If return date is entered and it is before the pick up date, the user will receive an error message that return date is before the return date and the correction must be made by the user.

1.9.5 Return Time:

- If the return time is changed, the new time must meet the same rules for entering return time.

1.9.6 Return Method:

- If the return method is changed, the location will be blanked out.

1.10 Rate Fields

1.10.1 Account Name

- If account name is deleted, the account number and rate plan fields will be blanked.
- If the account name is changed, the same guidelines for entering an account name apply. Must choose from dropdown or from search. Once a new account name is chosen, the account number will populate and if there is only one rate plan for that account that will populate as well. If there is more than one rate plan to choose from the rate plan field will display "select".

1.10.2 Account Number

- If account number is deleted, the account name and rate plan fields will be blanked.
- If the account number is changed, the same guidelines and validations for entering an account number apply. Once a new account number is chosen, the account name will populate and if there is only one rate plan for that account that will populate as well. If there is more than one rate plan to choose from the rate plan field will display "select".

1.10.3 Rental Type

- No business rules for editing Rental type apply in reservation.

1.10.4 Rate Plan

- If the user changes the rate plan, "get rates" must be pressed to retrieve the rates for that rate plan.

1.10.5 Car Class

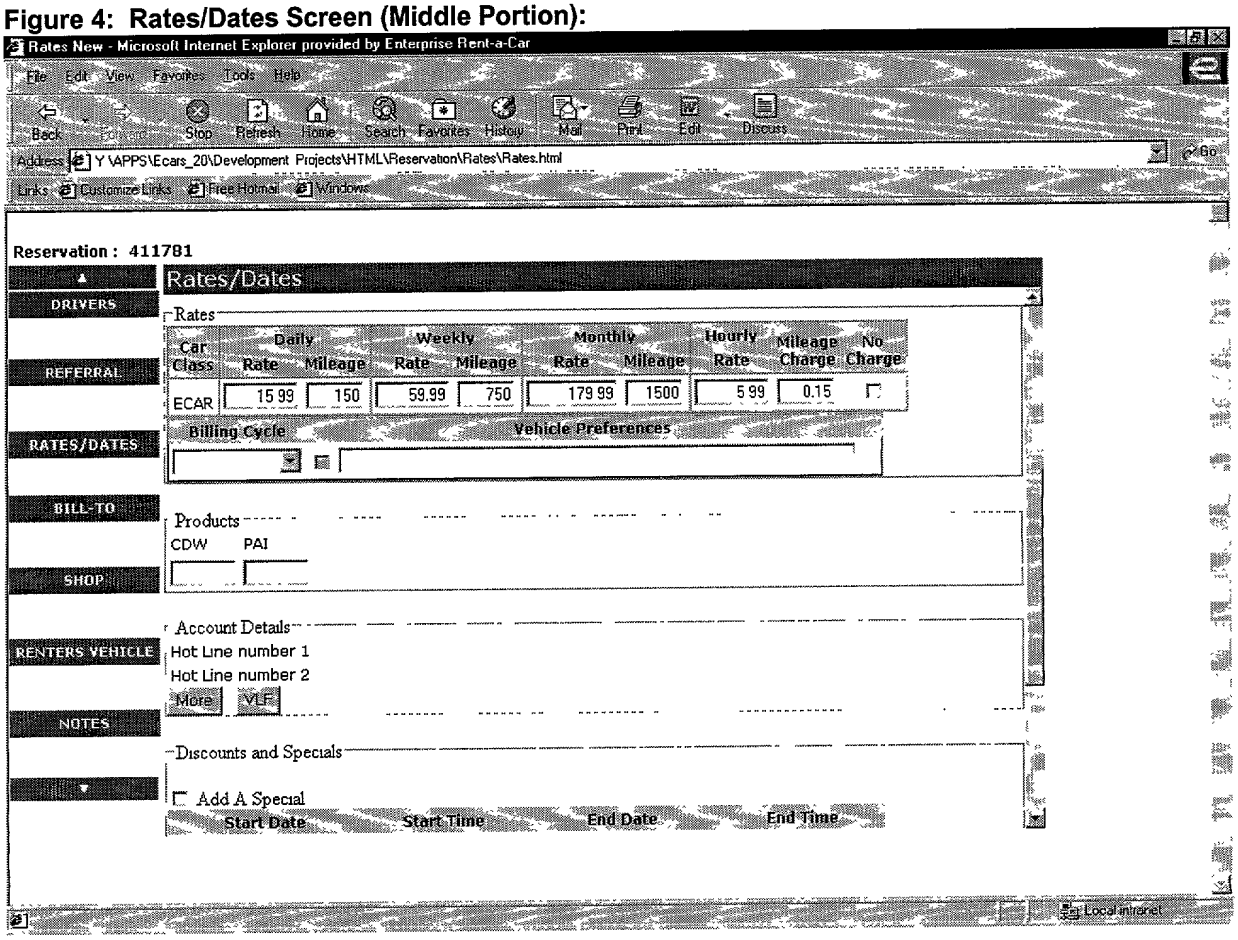
- If car class is changed, "get rates" must be pressed to retrieve rates for the new car class entered.
- If car class is deleted and the get rates button is pressed the table of rates for the rate source/plan entered will be displayed. The user has the ability to select a car class from the table.
- If there was no car class originally entered but there were rates entered and the user selects a car class, the rate originally entered will remain unless the user manually types over the rates or selects a car class from the table of rates after choosing get rates.
- Car class may be manually entered with no other rate information.

1.10.6 Rates

- Rates May be manually entered without a Rate Source.

- Rates can be deleted.
- Rates that are edited will remain after the rate source is changed unless a different car class is selected from get rates.
- Hitting Cancel after getting rates will keep rates.

Figure 4: Rates/Dates Screen (Middle Portion):



1.10.7 Billing Cycle

- There are no edit business rules associated with this field in reservation.

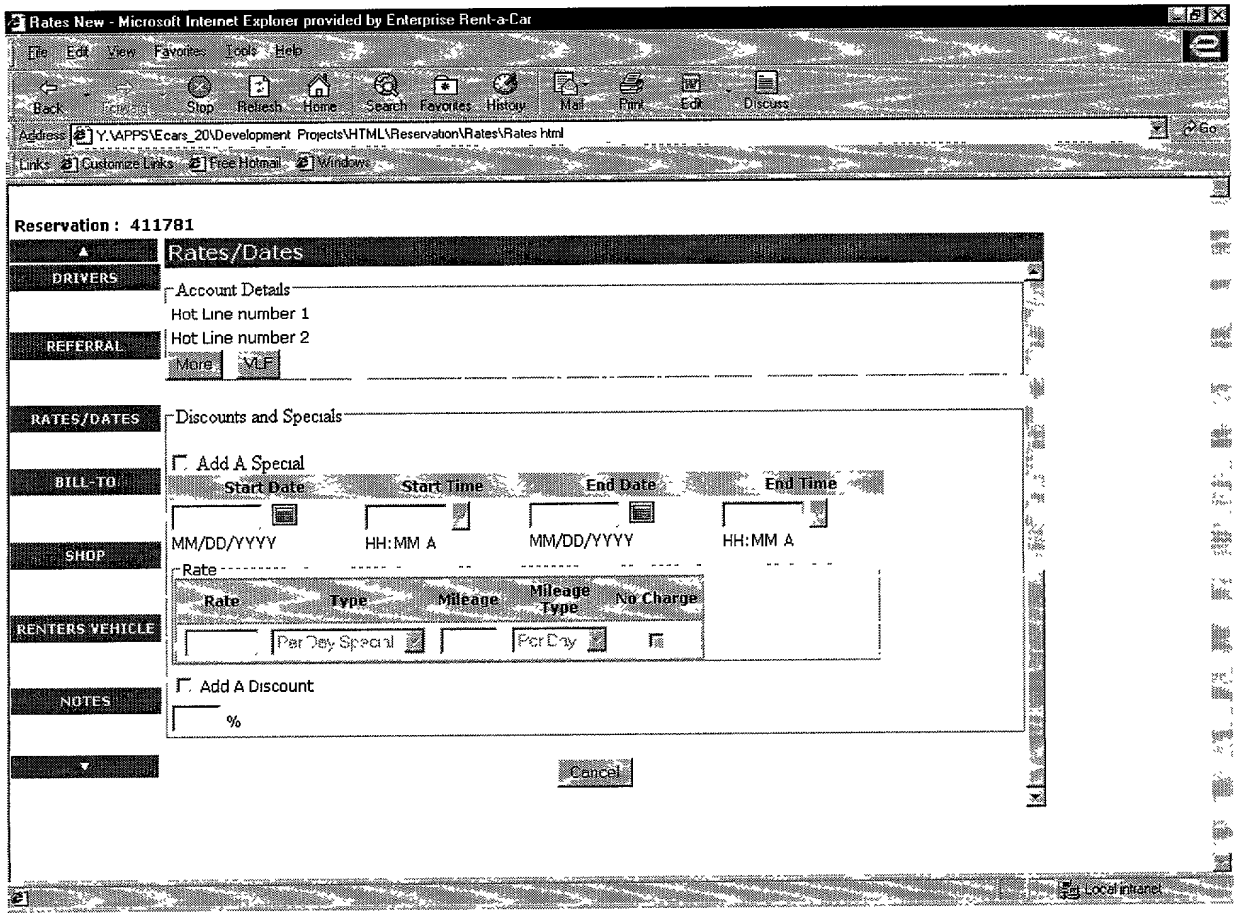
1.10.8 CDW

- There are no edit business rules associated with this field in reservation.

1.10.9 PAI

- There are no edit business rules associated with this field in reservation.

Figure 5: Rates/Dates Screen (Discounts and Specials):



1.11 Discounts and Specials

1.11.1 Add a special

If add a special is unchecked then start date, start time, end date, end time, special rate and mileage remains but the information is ignored by the system.

1.11.2 Start date

- If start date is changed, the system will validate that the start date is not after the end date.
- If there is a pick up date and the user changes the special start date to a date before the pick up date, the system will inform the user that the start date cannot be before the pick up date.
- If there is no pick up date, and the user changes the special start date to a date before the current date, the system will inform the user that the start date cannot be before the current date.
- If the start date is deleted, the system will display a message that a start date must be specified for a special.

1.11.3 End date

- If the end date is changed the system will validate that the end date is not before the start date and provide a message if it is.
- If there is a return date, then the special end date cannot be after the return date, otherwise the system will display a message that the special end date must be equal to or before the return date entered.
- If the end date is deleted, the system will display a message that an end date must be specified for a special.

1.11.4 Start Time

- No business rule for deleting the start time of a special.

1.11.5 End time

- No business rule for deleting the end time of a special.

1.11.6 Rate

- No business rule for deleting the rate on a special.

1.11.7 Type

- There is no validation on changing the type.

1.11.8 Mileage

- There is no validation on changing or deleting the mileage for a special.

1.11.9 Mileage Type

- There is no validation on changing the mileage type.

1.11.10 No charge

- If there is a mileage charge on the reservation there must be a mileage charge for the special.
- If there is no mileage charge on the reservation there can't be a mileage charge on the special.

1.11.11 Add a discount

- If the add a discount box is unchecked when editing, the discount percent remains but is ignored by the system.
- If the discount box is checked when editing, a discount must be entered.

1.11.12 Discount Percent

- The discount amount can't be changed to over 50% or less than 1%, otherwise the system will inform the user as such. (Discounts must be entered in whole numbers).

1.12 ARMS

1.12.1 Protected Fields in ARMS

- If the reservation originated from the ARMS system there are certain fields that will be protected/(not editable by the user). They are as follows:

1. Claim/POL/PO Number
2. Claim Type (C, I, T)
3. Insured's Name
4. Auth By
5. Direct Bill (Y, N)
6. % Auth
7. Max Days Authorized
8. Max Billable Amount
9. Policy Max Amount
10. Daily Max Amount
11. Date of Loss
12. Bill-To Start Date

13. Bill-To End Date (Auth until Date)
14. Number of Days Authorized
15. Daily Rate Authorized
16. Tax Authorized (Y, N)
17. Car class Authorized
18. Cancellation Date (Last Day Date)
19. Bill-To Account Number (Except if root only is entered then protected once full account number is entered)

1.12.1.1 Editable Fields in ARMS:

(Note: The following editable fields for ARMS reservations follow the same edit rules as the non-arms reservations that were covered above in Driver)

- Driver Last Name
- Driver First Name
- Hm Phone
- Work Phone
- Extension
- Other Phone
- Phone Description
- Driver's Address
- Zip
- County
- City
- State
- Other Address
- Employer
- License Number
- Expiration Date
- State Issued
- DOB
- SSN
- Height
- Weight
- Hair Color
- Eye Color

1.12.2 ARMS Indicator

- Once a user selects an ARMS reservation for editing, the system must know the status of the reservation; contacted, contact attempted or not contacted.
- Before the user will be able to save or exit the reservation, the system will display a message to the user that must be responded to:
  1. Has the renter has been contacted? Yes and No check box or option areas will be displayed.
  2. Has an attempt been made to contact the renter? Yes and No check box or option areas will be displayed.

- If the ARMS reservation that's being edited is in a not contacted state and the user saves, the user responds that contact was attempted and the status of this reservation will change to contact attempted.
- If the ARMS reservation that's being edited is in a not contacted state and the user saves, the user responds that contact was made and the status of this reservation will change to contacted and this reservation will no longer display in the ARMS notification result list.

- If the ARMS reservation that's being edited is in a contact attempted state and the user saves, the user responds that contact was attempted and the status of this reservation will not change.
- If the ARMS reservation that's being edited is in a contact attempted state and the user saves, the user responds that contact was made, the status of this reservation will change to contacted and will no longer display in the ARMS notification result list.

- If the ARMS reservation that's being edited is in a contacted state and the user saves, no message will be saved.

1.13 NATRES

1.13.1.1 Protected Fields in Natres

- A Branch employee cannot edit a National Reservation originated reservation. If a National Reservation is selected for editing by a branch employee, all fields for the Reservation are view only.
- (See Enhancement #1080 – Ability to Edit Natres Reservations).

1.14 Completing after Editing information

- Saving an edited reservation follows the same business rules as saving a created reservation and the same validations occur and informational messages and error messages will display upon committing the edited information to the database.

1.15 Void

1. ARMS and NATRES reservations may not be voided by branch personnel.
2. An outside group cannot void branch reservations for a group other than the owning group of the physical terminal signed onto by the user.

3. For branch reservations, void must be available to the user on all reservation screens.
4. The system must confirm to the user that a reservation is being voided.

Special Edit Rules

Post-Conditions

1.16 < Post-condition One >

Extension Points

1.17 <Name of Extension Point>

<Company Name>

ECARS 2.0 - Other Address Screen Action Specification

Revision History

Date	Version	Description	Author
6/12/01	1.1	Created Document	Johnny S. Johnston
09/04/2001	1.2	Updated due to changes from Navigation use case.	James Atteberry

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Other Address screen.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Other Address Screen

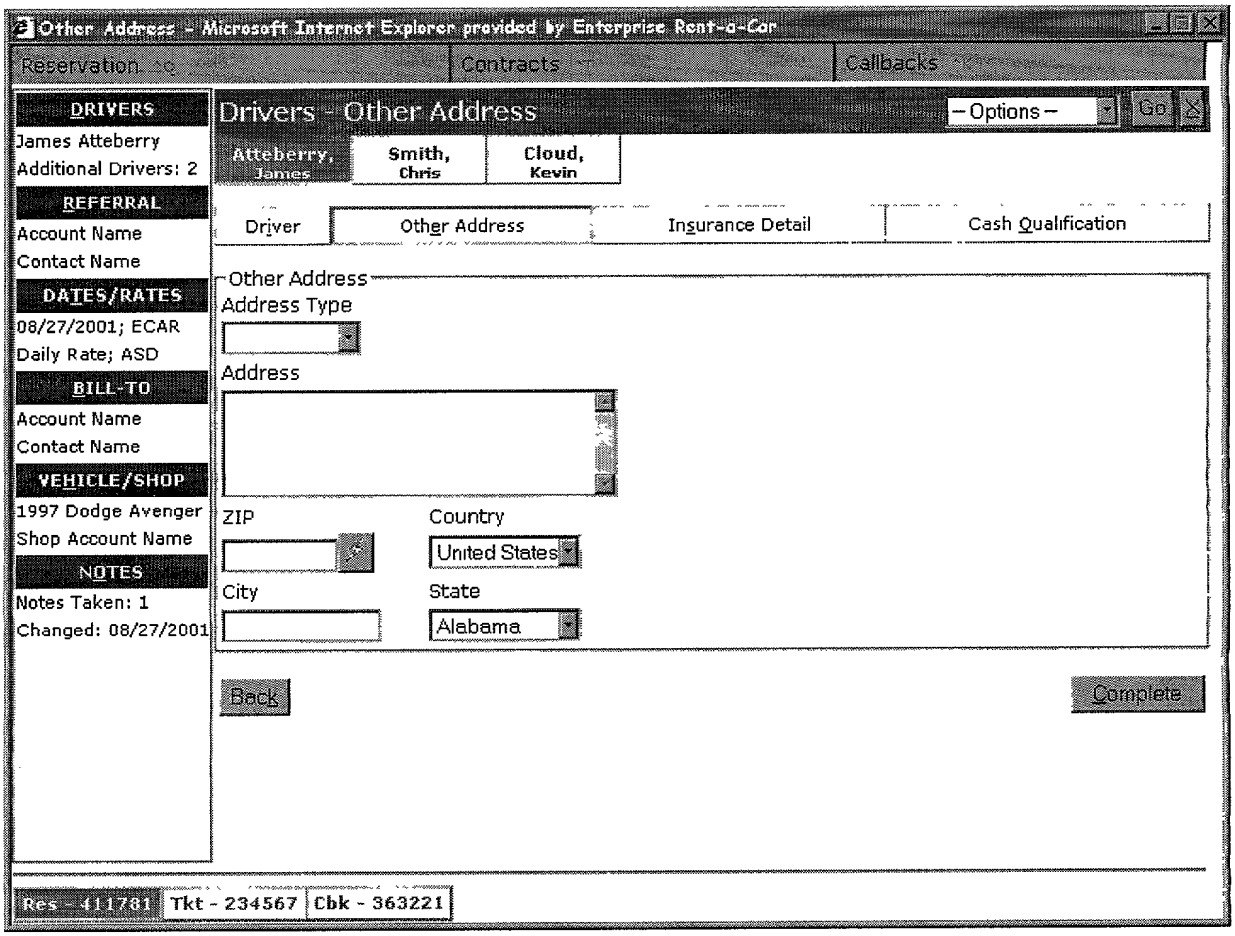

Figure 1 – Other Address Screen

3. Reservation Number

3.1 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation number will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message stating "A maximum of 3 reservations may be displayed".

3.4 System Exceptions

None identified at this time.

4. Other Address Title Bar Area

4.1 Behavior

The option area in the title bar will allow the user to access transaction-wide functions. These functions for Reservation are: -- Options --, Print, Void and Transfer. The default option is "—Options –". The user must press the Go button to initiate the selected function.

The button area in the title bar contains two buttons – a Go button and a Close button.

The Go button is always active, and is used to initiate a function selected in the option area. If the selected option is "—Options –", nothing should happen.

The Close button is always active and is used to close the current transaction. The button is labeled with an 'X'. Pressing this button will cause a confirmation popup, asking the user if they wish to cancel the transaction and lose all changes. If the user selects 'No', they are returned to the same screen. If the user selects 'Yes', the transaction is closed with no changes saved to the database and the user is taken to the Reservation home page.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Driver Tab Navigation Area

5.1 Behavior

This area contains a tab for each driver on the transaction. The first tab is the primary renter, with all other tabs being additional drivers. The name on the tab will be the Last Name on the top and the First Name on the bottom of the tab.

By clicking on a tab, the main driver screen for that driver will be brought up.

5.2 Validation

5.3 Business Exceptions

5.4 System Exceptions

6. Driver Navigation Area

6.1 Behavior

This area gives the user the ability to move to any screen within the Driver area. Each screen within the Driver area is connected by a hyperlink. The screens that have been defined are: Driver, Other Address, Insurance Detail, and Cash Qualification. A hyperlink will NOT be available for the screen that is currently displayed.

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. Other Address Area

7.1 Behavior

This area is a free form alphanumeric area.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Other Address Type Area

8.1 Behavior

This search criteria area will be a drop-down box. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state beginning with "H" in the list. Valid values are Home, Business, Local and Other.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time

9. City, State, Zip Code and Country, and City Other, State Other, Zip Code Other and Country Other Areas

9.1 Behavior

These behaviors are detailed out in the Geo-Framework Search Screen Spec

9.2 Validation

None identified at this time.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

None identified at this time.

10. Button Line Area

10.1 Behavior

The Back button will take the user back to the main driver screen for the currently selected driver. The Complete button will initiate a save of the transaction. All validations will be performed, returning any errors to the user. If there are no errors, the transaction is written to the database and the user is returned to the Reservation home page.

10.2 Validation

None identified at this time.

10.3 Business Exceptions

None identified at this time.

10.4 System Exceptions

None identified at this time.

11. Rules

None identified at this time.

12. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

<Company Name>

ECARS 2.0 - GEO Framework
Screen Action Specification

Revision History

Date	Version	Description	Author
6/12/01	1.1	Created Document	Johnny S. Johnston
6/15/2001	2.0	Revised for second panel review meeting	Johnny S. Johnston

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the GEO Framework aspects on all types of address screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. GEO Framework Choices Screen

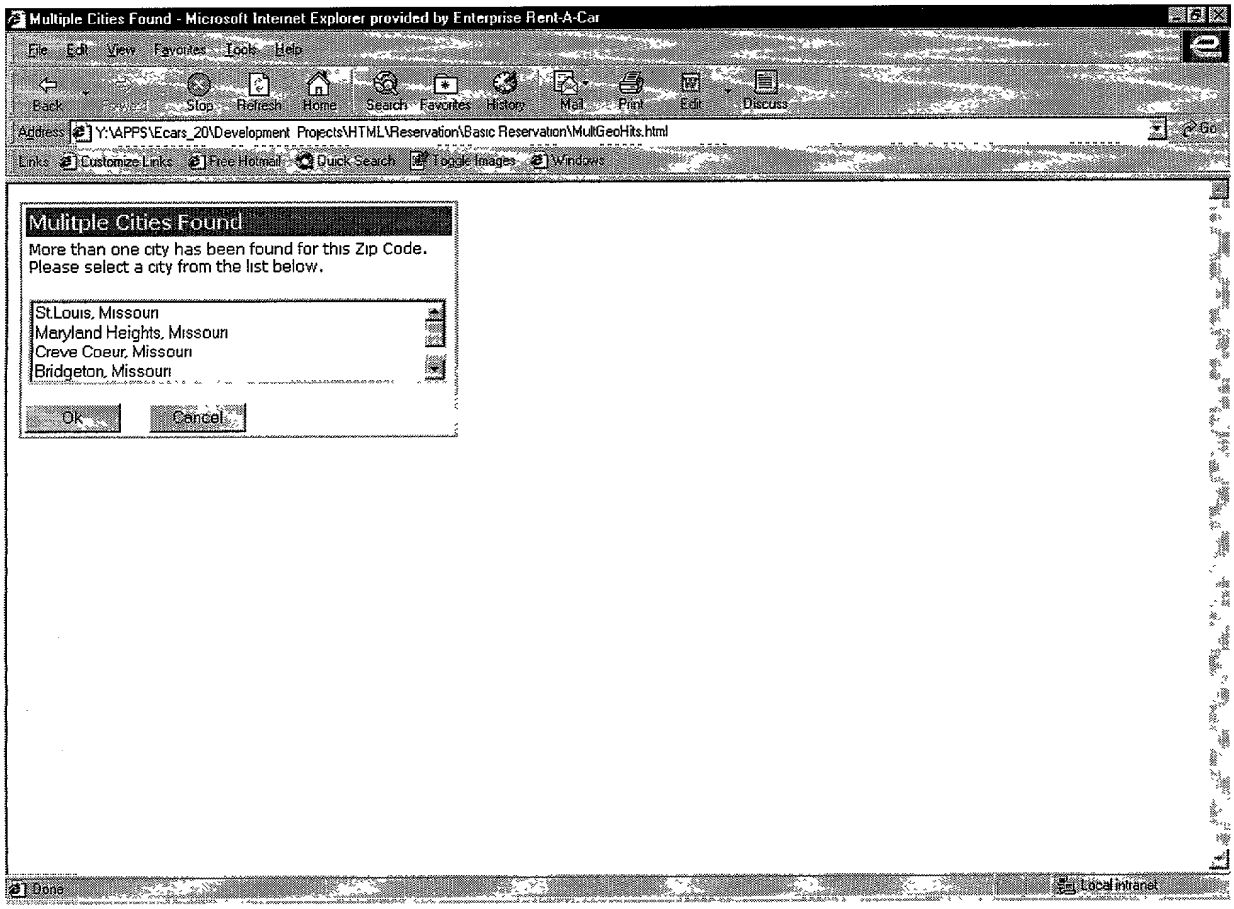

Figure 1 – GEO Framework Screen

3. Zip Code Area

3.1 Behavior

This will be an alphanumeric area. The user will enter a zip code and then have the option to invoke the GEO Framework search or not. The GEO Framework search is to locate a City and a State associated with the zip code entered.

If the GEO Framework search is selected, three results might happen:

1. There are not any matches to the values entered. If this happens, a message is displayed "No matches were found for zip code."
2. There is a single match to the values entered. If this happens, the City and State areas are populated with the match values found.
3. There are multiple matches to the values entered. If this happens, the user is presented with the panel in 2. above, and the user must make a selection and click on the Ok button. The system will then populate the City and State areas with the selected values.

If the GEO Framework is not selected the system accepts values entered.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

None identified at this time.

3.4 System Exceptions

None identified at this time.

4. Country Area

4.1 Behavior

This search criteria area will be a drop-down box. It should be defaulted to the Country of the terminal locale on initial entry or navigation to an address panel.
The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state beginning with "H" in the list.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. City Area

5.1 Behavior

This area is a free form alphanumeric area.
If the GEO Framework search has been selected and a single value was found, or the user

selected a value from the list, then this area will be populated with that value.
Even though a value may be populated by the system, the area still may be changed or edited.

5.2 Validation

None identified at this time.

5.3 Business Exceptions

None identified at this time.

5.4 System Exceptions

None identified at this time.

6. State Area

6.1 Behavior

This search criteria area will be a drop-down box. It should be defaulted to a blank.
If the GEO Framework search has been selected and a single value was found, or the user selected a value from the list, then this area will be populated with that value.
The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state beginning with "H" in the list.

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time

7. Button Line Area

7.1 Behavior

The Cancel image/button will remove this image and present the previous panel.
The Ok image/button will take the selected city and state and populate the City and State areas within the original address panel with the values selected.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Rules

None identified at this time.

9. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print

anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

<Company Name>

ECARS 2.0 - Additional Drivers Screen Action Specification

Revision History

Date	Version	Description	Author
06/08/2001	1.0	Created Document	Johnny S. Johnston
6/15/2001	2.0	Revised for second panel review meeting	Johnny S. Johnston
6/20/2001	2.1	Revised after further clarification.	Johnny S. Johnston
7/13/01	2.2	Revised for developers changes	Johnny S. Johnston
8/30/2001	2.3	Update to reflect changes from Navigation use case.	James Atteberry
09/14/2001	2.4	Updated to add Delete button for additional driver.	James Atteberry
09/14/2001	2.5	Removed Primary Payment Method from screen.	James Atteberry
11/14/2001	2.6	Additional Driver Last Name validation was added	Jed Gaines

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Additional Drivers screen.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Additional Driver Screen

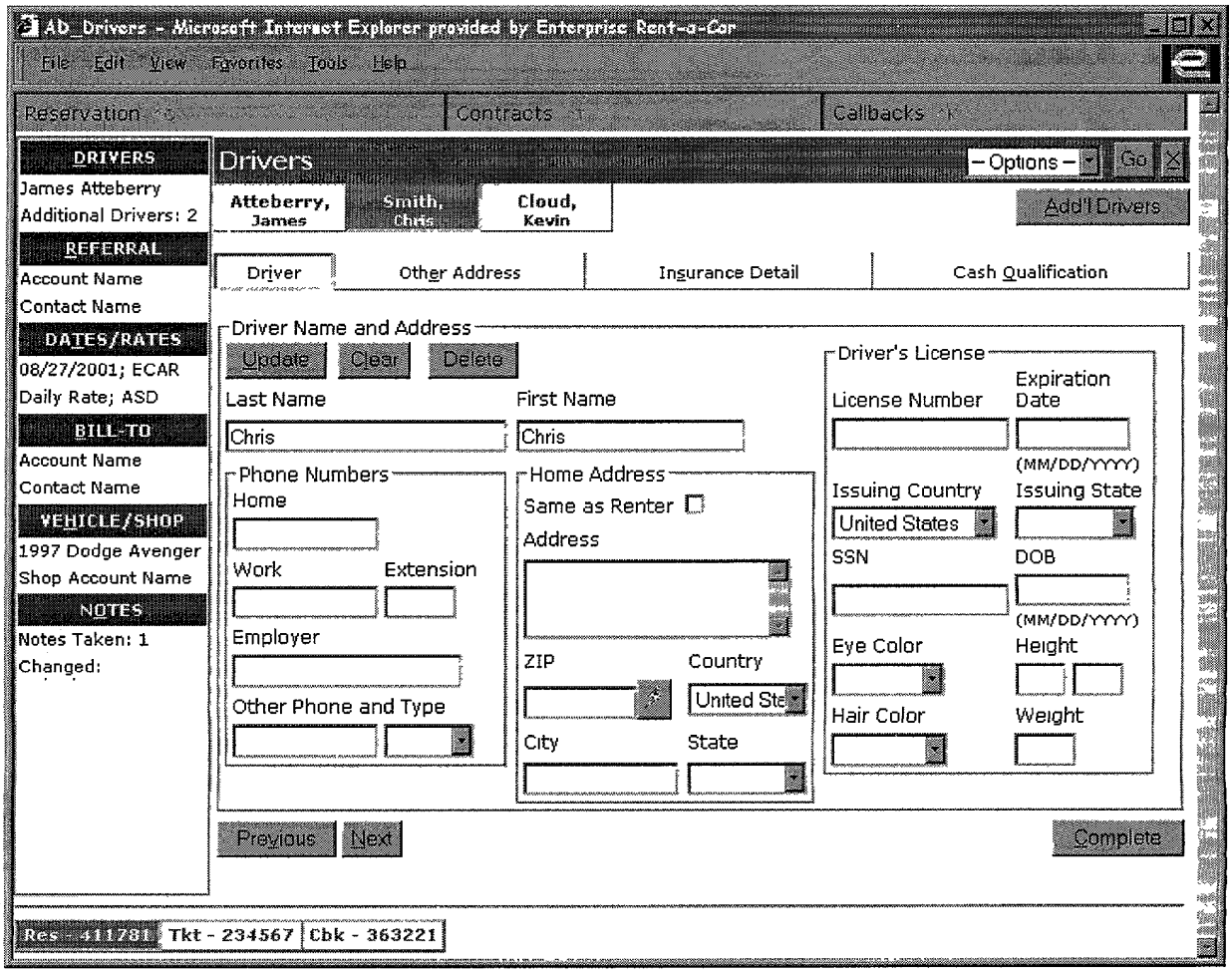


Figure 1 – Additional Drivers Screen

3. Reservation Number

3.1 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation number will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message stating, "A maximum of 3 reservations may be displayed".

3.4 System Exceptions

None identified at this time.

4. Additional Driver Bar Area

4.1 Behavior

The option area in the Additional Driver Title Bar will allow the user to access transaction-wide functions. These functions for Reservation are: -- Options --, Print, Void and Transfer . The default option is "— Options –". The user must press the Go button to initiate the selected function.

The Title Bar Button area in the Additional Driver Title Bar contains two buttons – a Go button and a Close button.

The Go button is always active, and is used to initiate a function selected in the Option area .

The Close button is always active and is used to close the current transaction. The button is labeled with an 'X'. Pressing this button will cause a confirmation popup, asking the user if they wish to cancel the transaction and lose all changes. If the user selects 'No', they returned to the same screen. If the user selects 'Yes', the transaction is closed with no changes saved to the database.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Button Line Area

5.1 Behavior

The Previous button will take the user to the notes screen within the same transaction.

The Next button will take the user to the Referral screen within the same transaction

The Complete button will initiate a save of the transaction. All validations will be performed, returning any errors to the user. If there are no errors, the transaction is saved, and the user is returned to the Reservation home page.

5.2 Validation

None identified at this time.

5.3 Business Validation

None identified at this time.

5.4 System Validation

None identified at this time.

6. Driver Navigation Area

6.1 Behavior

This area gives the user the ability to move to any screen within the Driver area. Each screen within the Driver area is connected by a hyperlink. The screens that have been defined are: Drivers, Other Address, Insurance Detail, and Cash Qualification. A hyperlink will NOT be available for the screen that is currently displayed.

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. Update Button Function

7.1 Behavior

All information that is initially presented in this panel will be "read only". This button must be selected before the user can edit any of the information. If the user has selected this button and moves to a different panel, the panel will still be in the edit mode when the user returns to it. Similarly, if the button is not selected and the user moves to another panel, the panel will still be in the "read only" mode when the user returns to it.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

The information areas on this panel will not be enabled for editing, if this button is not selected.

7.4 System Exceptions

None identified at this time.

8. Clear Button Function

8.1 Behavior

All information that is initially presented in this panel will be "read only". If this button is selected, all if the information areas on the panel will be cleared and will be available for input. This will have the same functionality as adding a new driver to the reservation. If the user has selected this button and moves to a different panel, the panel will still be in the edit mode when the user returns to it. Similarly, if the button is not selected and the user moves to another panel, the panel will still be in the "read only" mode when the user returns to it.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time.

9. Delete Button Function

9.1 Behavior

When the Delete button is pressed, the user will be prompted to confirm the deletion of the additional driver ("Are you sure you wish to remove FIRST NAME LAST NAME from the reservation?"). If the request is confirmed, the additional driver is removed from the reservation. The user is then take to the main driver page of the main renter. If the request is cancelled, the user will start on the main driver page of the currently selected additional driver.

Note that the main driver is NOT considered an additional driver, and thus cannot be removed from the reservation.

9.2 Validation

The user must confirm that the delete request.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

None identified at this time.

10. Driver's Last and First Name

10.1 Behavior

This area is divided into two fields.

- Last Name
- First Name.

Both fields are free form text fields and may contain alphanumeric values.

10.2 Validation

If the user attempts to exit the screen or complete the reservation, the last name field must have values

entered. If there are not values in the last name field, the system will display a message "Last Name is required for a Reservation". ***See Error Message Spec

10.3 Business Exceptions

None identified at this time.

10.4 System Exceptions

None identified at this time.

11. Address Same as Driver Checkbox

11.1 Behavior

This checkbox will indicate if this additional driver should have the same address as the Renter. When the button is checked, the Address, Country, Zip, City and State fields are set to their default values (blank or the initial value if this is a select box). The fields are also disabled.

When the checkbox is unchecked, the fields are enabled for input.

11.2 Validation

None identified at this time.

11.3 Business Exceptions

If this botton is selected, and there is not any address information in the first driver's address areas, a message is displayed "No Driver Address Information Available".

11.4 System Exceptions

None identified at this time.

12. Home Address Area

12.1 Behavior

This area is a free form alphanumeric area. This area is disabled if the Address Same as Driver check box has been selected.

12.2 Validation

None identified at this time.

12.3 Business Exceptions

None identified at this time.

12.4 System Exceptions

None identified at this time.

13. Zip Code, Country, City and State

13.1 Behavior

These behaviors are detailed out in the Geo-Framework Search Screen Spec. These areas are disabled if the Address Same as Driver check box has been selected.

13.2 Validation

None identified at this time.

13.3 Business Exceptions

None identified at this time.

13.4 System Exceptions

None identified at this time.

14. Home Phone Area

14.1 Behavior

The Home Phone area is a free form text area that will allow the user to input alphanumeric values.

14.2 Validation

None identified at this time.

14.3 Business Exceptions

None identified at this time.

14.4 System Exceptions

None identified at this time.

15. Work Phone Area

15.1 Behavior

The Work Phone area is a free form text area that will allow the user to input alphanumeric values.

15.2 Validation

None identified at this time.

15.3 Business Exceptions

None identified at this time.

15.4 System Exceptions

None identified at this time.

16. Phone Extension Area

16.1 Behavior

The Phone Extension area is a free form text area that will allow the user to input alphanumeric values. This area would not be enabled until there was a value entered into the Work Phone area.

16.2 Validation

There must be a value in the Work Phone area before this area is enabled.

16.3 Business Exceptions

None identified at this time.

16.4 System Exceptions

None identified at this time.

17. Employer Area

17.1 Behavior

The Employer area is a free form text area that will allow the user to input alphanumeric values.

17.2 Validation

None identified at this time.

17.3 Business Exceptions

None identified at this time.

17.4 System Exceptions

None identified at this time.

18. Other Phone Area

18.1 Behavior

The Other Phone area is a free form text area that will allow the user to input alphanumeric values.

18.2 Validation

None identified at this time.

18.3 Business Exceptions

None identified at this time.

18.4 System Exceptions

None identified at this time.

19. Phone Type Area

19.1 Behavior

This area will be a drop down area that will default to a blank. When the user clicks the drop down area, the system will display the domain of Phone Types available.

19.2 Validation

If there is a value entered in the Other Phone area, then a type other than blank must be selected.

19.3 Business Exceptions

If values exist within the Other Phone area, the system will also verify that a value, other than blank, has been selected from the drop down area Phone Type. If one has not been selected, the system displays a message "Phone Type must be selected".

19.4 System Exceptions

None identified at this time.

20. License Number

20.1 Behavior

This area will allow entry of alphanumeric values.

20.2 Validation

If values are entered into any one or combination of Expiration Date, State Issued and/or Date of Birth, then License Number is also required. The system will check which of these four areas contain or do not contain values and will present the user with a message stating which area(s) need to have a value. Example, if Expiration Date and State Issued contain values and Date of Birth and License Number do not, the system can display a message stating "Missing Information in:

- Date of Birth
- License Number"

In this example the list would state that required information is missing for License number and Date of Birth, but it could be any combination of the four.

20.3 Business Exceptions

If values are entered into the License Number area then the Expiration Date, State Issued and Date of Birth areas become required.

20.4 System Exceptions

None identified at this time.

21. Expiration Date

21.1 Behavior

This will be a numeric field. It will not be formatted for presentation purposes. The user may enter delineating characters, but these will be stripped out before committing the data to the database. (As determined for all locale specific formatting.)

21.2 Validation

This date cannot be less than or equal to the current date. If it is a message is displayed stating, "Driver License Expiration Date is Invalid".
If values are entered into any one or combination of License Number, State Issued and/or Date of Birth, then Expiration Date is also required. The system will check which of these four areas contain or do not contain values and will present the user with a message stating which area(s) need to have a value. See example with License Number.

21.3 Business Exceptions

If values are entered into the Expiration Date then the License Number, State Issued and Date of Birth areas become required.

21.4 System Exceptions

None identified at this time.

22. State Issued

22.1 Behavior

This search criteria area will be a drop-down box. It should default to a blank. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state beginning with "H" in the list)

22.2 Validation

If values are entered into any one or combination of License Number, Expiration Date, and/or Date of Birth, then State Issued is also required. The system will check which of these four areas contain or do not contain values and will present the user with a message stating which area(s) need to have a value. See example with License

22.3 Business Exceptions

If a state is selected from this drop down area, then the Expiration Date, License Number and Date of Birth areas become required.

22.4 System Exceptions

None identified at this time.

23. Date of Birth

23.1 Behavior

This will be a numeric field. It will not be formatted for presentation purposes. The user may enter delineating characters, but these will be stripped out before committing the data to the database. (As determined for all locale specific formatting.)

23.2 Validation

If values are entered into any one or combination of Expiration Date, State Issued and/or License Number, then Date of Birth is also required. The system will check which of these four areas contain or do not contain values and will present the user with a message stating which area(s) need to have a value. See example with License

23.3 Business Exceptions

If the Date of Birth entered calculates to being equal to, or greater than, 70 years of age, the system displays a message "Age is over age restriction". The user may continue, change the Date of Birth or cancel.

If the Date of Birth entered calculates to being between the ages of 18 to 20, the system displays a message "Age is under age restriction". The user may continue, change the Date of Birth or cancel.

If the Date of Birth entered calculates to being between the ages of 21 to 24, the system displays a message "Age is under age restriction". The user may continue, change the Date of Birth or cancel.
(Note: While these are now identical behaviors, in the future, different groups want to have the ability to have different actions and messages for these 2 age groups.)

If the Date of Birth entered calculates to being equal to, or less than, 17 years of age, the system displays a message "Age is under age restriction". The user may NOT continue, they must change the Date of Birth or cancel.

If values are entered into Date of Birth, then the Expiration Date, License Number and State areas become required.

23.4 System Exceptions

None identified at this time.

24. Social Security Number

24.1 Behavior

This area will allow entry of alphanumeric values.

24.2 Validation

None identified at this time.

24.3 Business Exceptions

None identified at this time.

24.4 System Exceptions

None identified at this time.

25. Height

25.1 Behavior

This will be two areas, in North America one for feet and the other for inches. It will allow entry of numeric values.

25.2 Validation

None identified at this time.

25.3 Business Exceptions

None identified at this time.

25.4 System Exceptions

None identified at this time.

26. Eye Color

26.1 Behavior

This search criteria area will be a drop-down box. It should default to a blank. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state beginning with "H" in the list)

26.2 Validation

None identified at this time.

26.3 Business Exceptions

None identified at this time.

26.4 System Exceptions

None identified at this time.

27. Weight

27.1 Behavior

This area will allow entry of numeric values.

27.2 Validation

None identified at this time.

27.3 Business Exceptions

None identified at this time.

27.4 System Exceptions

None identified at this time.

28. Hair Color

28.1 Behavior

This search criteria area will be a drop-down box. It should default to a blank. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state

beginning with "H" in the list)

28.2 Validation

None identified at this time.

28.3 Business Exceptions

None identified at this time.

28.4 System Exceptions

None identified at this time.

29. Button Line Area

29.1 Behavior

The Cancel image/button display the previous panel without saving any changes prior to the last save.
The Additional Drivers image/button will invoke the additional driver panel, submitting the form to the server.

29.2 Validation

None identified at this time.

29.3 Business Exceptions

None identified at this time.

29.4 System Exceptions

None identified at this time.

30. Rules

30.1 Behavior

If there is a renter warning concerning the Driver, a renter warning message, similar to the one shown below, should be displayed. It should be defaulted to the "Do Not Rent" selection. The user may override by making the "Rent" selection.
If the "Do Not Rent" is selected, the system returns to the Reservation Home Panel.
If the "Rent" is selected, the system returns to original panel.

30.2 Validation

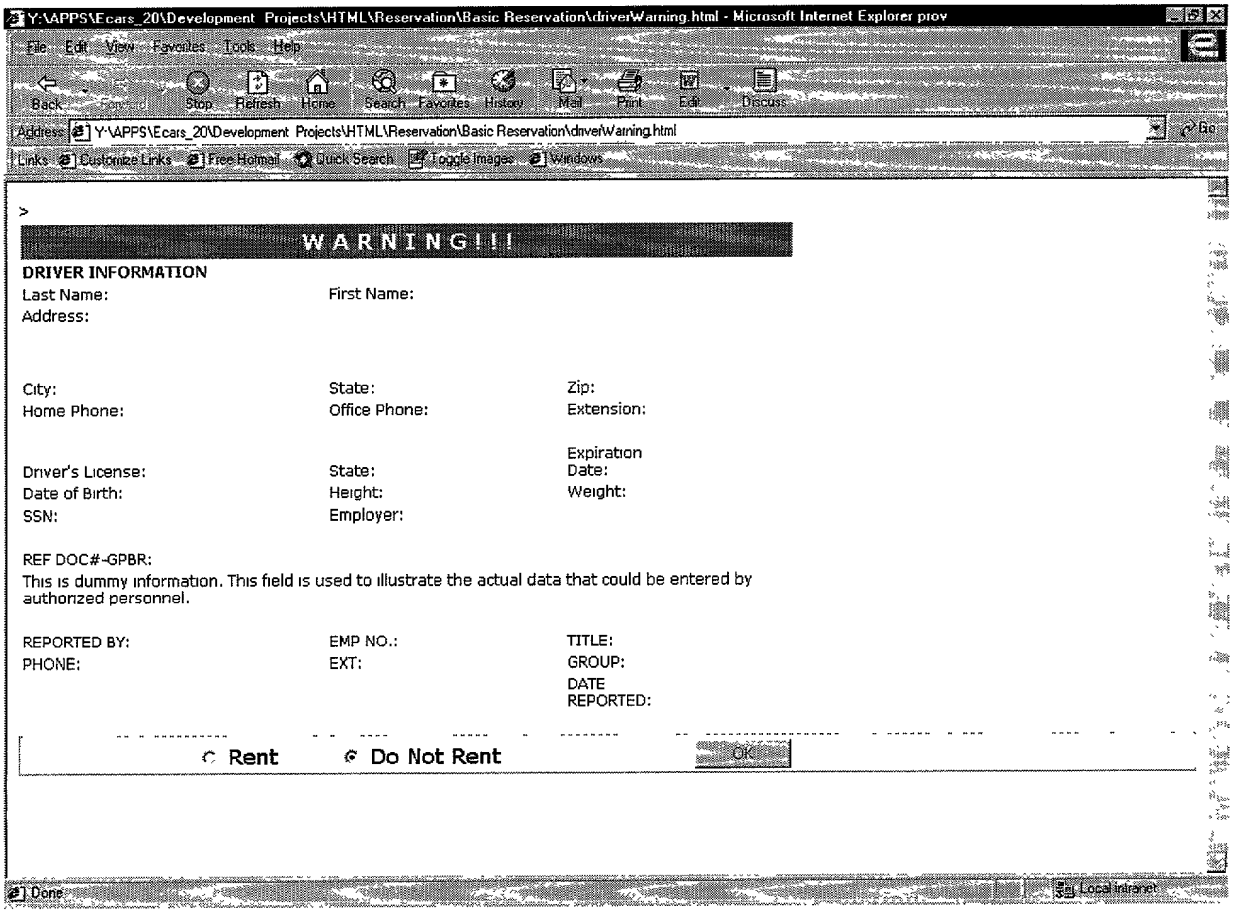
None identified at this time.

30.3 Business Exceptions

If the user chooses the "Rent" selection, a system note is generated. (See Notes Use Case for specifics.)

30.4 System Exceptions

None identified at this time.



31. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

ECARS 2.0 Reservation
Use Case Specification: Referral

Version 1.5

Revision History

Date	Version	Description	Author
06/03/01	1.0	First Draft	M. Pallia
6/6/01	1.1	Revisions based on the input of the Open Ticket team. Revisions included some wording changes as well as the removal of the most common navigation area flow.	M. Pallia
6/7/01	1.2	Changed document to notate that it is Account Name and Legacy Customer Number	M. Pallia
6/8/01	1.3	The following changes were made during the user review: The basic flow was changed from entering a referral number to picking one from the Branch short list. Changed name to Referral from Referral Call. A customer number is a Legacy Customer Number. Search must have 2 criteria unless it is name or phone number. Finally added special requirements 3 thru 6.	M. Pallia
6/12/01	1.4	Added the following requirement: 1) A new contacted cannot be added to a fleet type Account. Changed the following requirement. 1) During the Search, the user can select one or more account type or an all option.	M. Pallia
6/15/01	1.5	Replaced Legacy Customer Number with Account Number. Added a new section that is called Future Scope that details out the functional areas we will not be delivering for Pilot	M. Pallia
9/7/01	1.6	Changed wording from Telephone Number to Phone Number. Changed Account Search to Search.	L. Moellman
11/01/2001	1.7	Removed reference to account phone number extension.	James Atteberry

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Use Case Specification: Referral

1. Referral

1.1 Brief Description

This use case describes the interactions a user will take when a renter is referred to Enterprise by a promotional discount, an Account, a TV ad campaign or any other method of attracting Renters, or an employee of Enterprise refers a renter (Employees can refer themself as well).

2. Flow of Events

2.1 Basic Flow

2.1.1 This use case can be initiated at any point during the Reservation/Open Ticket process.

2.1.2 Depending on the person making the Reservation/Open Ticket, the user will use one of the two sub-flows . More commonly, the Account Referral Sub-flow is used.

2.2 Account Referral Sub-Flow

2.2.1 The system displays an area for the user to select an Account from the Branch Short List. The system also gives the user the option to :

- Enter an Account Number . If the user chooses this option, the use case continues alternate (Account Number).
- Search for an Account . If the user selects this option, the use case continues at alternate (Search)

2.2.2 The system retrieves and displays the Branch Short list. The columns that are displayed to the user are (from left to right). If the physical terminal location is in Europe, the use case continues at Alternate (European Branch Short List).

- Account name
- Account Number
- Account type
- Owning Group and Branch
- Address
- City
- State
- Zip
- Phone Number(s)

2.2.3 The user selects an account from the list . If the user does not choose an account from the list, the use case continues at (2.2.1) in the Account Referral Sub-Flow.

2.2.4 The system retrieves and displays the following information

- Account name
- Account Number
- Account type
- Owning Group and Branch
- Address
- City
- State
- Zip
- Phone Number(s)

2.2.5 The user has the option to select an Account contact for the selected account, select a different account or view the Account details of the selected account. If the user chooses to view "The Account Details", the use case continues at alternate (Account Details). If the user chooses to select a different account, the use case continues at alternate (2.2.1) within the Account Referral Sub-Flow.

2.2.6 The user chooses to view the list of contacts for the selected account.

2.2.7 The system displays the Account Contact list to the user. If there are no Contacts identified for a particular Account, the use case continues at alternate (No Contacts). The column displayed to the user will be the following :

- Name (First Name Last Name)
- Telephone Number
- Extension

2.2.8 The user has the option to select a contact from the list or add a New Contact. If the user chooses to add a new contact, the use case continues at alternate (Add New Contact).

2.2.9 The user selects a contact from the list.

2.2.10 The system displays the name of the contact and the contact's phone number to the user . The system also allows the user the ability to change the contact phone number . (NOTE: if the user changes the phone number, it will only save with the transaction. It will not be stored to the reference data)

2.2.11 From here, the user can navigate to any other area within the Reservation/Open Ticket and the system initiates the Reservation Navigation Use Case

2.2.12 The use case ends

2.3 Employee Referral Sub-Flow

2.3.1 The system displays an area for the user to perform the following options :

- A field to enter an Employee Number
- Search for an Employee . If the user chooses to search for an Employee, the use case continues at alternate (Employee Search)

2.3.2 The user types in an employee number .

2.3.3 The user initiates the search.

2.3.4 The system checks the status of the search. If No Employee Matches are found, the use case continues at alternate (No Employee Matches) If the search results in only one match, the use case continues in this Sub-Flow.

2.3.5 The system displays the following information to the user

- Employee Name
- Group and Branch Number – Group and Branch Description
- Department
- Title

2.3.6 From here, the user can navigate to any other area within the Reservation/Open Ticket and the system initiates the Reservation Navigation Use Case

2.3.7 The use case ends

2.4 Alternative Flows

2.4.1 Search

2.4.1.1 From the Account Referral Sub-flow, the system displays an area with all the fields emptied out so that the user can enter search criteria. The fields that are available are:

- Group . For reservation pilot, this will be defaulted to the physical terminal location and the user will not be able to change the group . This includes an "All Groups" option.
- Account Name
- Account Phone Number(s)
- Account Type . This includes an "All" option. (See Special Requirements for the list of valid Account Types)

2.4.1.2 The user enters an Account Name and selects "All" as the Account Type .

2.4.1.3 The user initiates the search

2.4.1.4 The system validates the search criteria . If only an account type is entered, the system will prompt the user that at least one other criterion must be selected . If only a group is chosen, the system will prompt the user that at least one other criterion must be selected .

2.4.1.5 The system checks the status of the search . If No Account Matches are found, the use case continues at alternate (No Account Matches).

2.4.1.6 The system displays the matches to the user in a summary list . The columns that are displayed to the user are: (from left to right)

- Account name
- Account Number
- Account type
- Owning Group and Branch
- Address
- City
- State
- Zip
- Phone Number(s)

2.4.1.7 The user can do any of the following options :

- Select an account from the summary list . If the user chooses this option, the use case continues at (2.2.6) in the Account Referral Sub-flow
- Clear the search criteria . If the user chooses this option, the use case continues at (2.5.2.1) of the Search Alternate.
- Search again . If the user chooses this option, the use case continues at (2.5.2.2) of the Search Alternate.
- Exit . If the user chooses this option, the use case continues at (2.2.2) in the Account Referral Sub-flow.

2.4.2 Enter an Account Number

2.4.2.1 From the Account Referral Sub-Flow, the user chooses to enter an Account Number.

2.4.2.2 The user types in an Account Number and initiates a search for all the information associated with the entered Account Number .

2.4.3 The system checks the status of the search. If No Account Matches are found, the use case

continues at alternate (No Account matches). If More than one Account match is found, the use case continues at alternate (More than One Account Match). If the search results in only one match, the use case continues at (2.2.5) within the Account Referral Sub-Flow.

2.4.4 No Account Matches

2.4.4.1 From the Account Referral Sub-Flow, the system displays a message to the user letting them know that No Account Matches or records were found .

2.4.4.2 The use case continues at (2.2.2) within the Account Referral Sub-Flow.

2.4.5 More Than One Account Match

2.4.5.1 The system displays a summary list of the matches to the user . The columns that will be displayed in the summary list are (from left to right):

- Account name
- Account Number
- Account type
- Address
- City
- State
- Zip
- Phone Number(s)

2.4.5.2 The user has the option to select an account from the list or to exit . If the user selects an Account from the list, the use case continues at (2.2.6) within the Account Referral Sub-Flow. If the user chooses to exit the list without selecting an Account, the use case continues at (2.2.2) within the Account Referral Sub-Flow.

2.4.6 Account Details

2.4.6.1 From the Account Referral Sub-Flow, the user chooses to see the details about the selected Account.

2.4.6.2 The system displays an area that shows the following details about the Account :

Account Details

- Account Name
- Account Number
- Account Type
- Address
- City
- State
- Zip Code
- Phone Number(s)

Special Instructions

- 2 "Hot" lines
- Miscellaneous Information
- Discounts
- Rules
- Products

2.4.6.3 The user is done looking at the information and the use case continues at (2.2.6) with in the Account Referral Sub-flow.

2.4.7 No Contacts

2.4.7.1 From the Account Referral Sub-Flow, the system displays a message letting the user know that no contact have been set up for this Account

2.4.7.2 The user can either add a new contact or exit . If the user chooses to add a new contact, the use case continues at alternate (Add New Contact). If the user chooses to exit, the use case continues at (2.2.7) within the Account Referral Sub-flow.

2.4.8 Add New Contact

2.4.8.1 From the Account Referral Sub-Flow, the system displays an area for the user to enter Contact information . The fields that can be entered are either :

- Last Name

AND/OR

- First Name

2.4.8.2 The user enters a first or last name and accepts the new contact information entered . If the user chooses to exit, the use case continues at (2.2.7) with in the Account Referral Sub-Flow.

2.4.8.3 The system associates the new contact added to the Account chosen and the use case continues at (2.2.12) with in the Account Referral Sub-Flow.

2.4.9 Employee Search

2.4.9.1 From the Employee Referral sub-flow, the user chooses to search for an employee .

2.4.9.2 The system displays an area with all the search criteria fields emptied out . The search criteria fields available for the user to enter are :

- Employee Last name
- Employee First name

2.4.9.3 The user enters a Last Name and a First name . If the user enters just a First Name and No Last Name, the use case continues at alternate (First Name Only).

2.4.9.4 The user initiates the search

2.4.9.5 The system checks the status of the search. If No Employee Matches are found, the use case continues at alternate (No Employee Matches).

2.4.9.6 The system displays the matches to the user in a summary list . The columns that are displayed to the user are : (from left to right)

- Employee Name
- Employee Number
- Group and Branch Number – Group and Branch Description
- Department
- Title

2.4.9.7 The user can do any of the following options :

- Select an employee from the summary list . If the user chooses this option, the use case continues at (2.3.5) in the Employee Referral Sub-flow

- Clear the search criteria . If the user chooses this option, the use case continues at (2.4.8.3) of the alternate (Employee Search).
- Search again . If the user chooses this option, the use case continues at (2.4.8.3) of the alternate (Employee Search)
- Exit . If the user chooses this option, the use case continues at (2.3.1) in the Employee Referral Sub-flow.

2.4.10 First Name Only

2.4.10.1 From the alternate (Employee Search), the system will display a message to the user that they must enter a last name along with a first name .

2.4.10.2 The use case continues at (2.4.8.3) in the alternate (Employee Search).

2.4.11 No Employee Matches

2.4.11.1 From the Employee Referral Sub-Flow or the alternate (Employee Search), the system displays that no employees match the criteria entered .

2.4.11.2 The use case continues at (2.1.3) within the Employee Referral sub-flow or (2.4.8.2) in the alternate (Employee Search).

2.4.12 European Branch Short List

2.4.12.1 From the account referral sub-flow, the system retrieves and displays the European Branch short list. (NOTE: This list is comprised of all accounts that have an owning Group that equals the Group of the Physical terminal's location.) The columns displayed to the user are:

- Account Name
- Account Number
- Account Type
- Owning Group/ Branch
- Address
- City
- State
- Zip
- Phone Number(s)

2.4.12.2 The user selects an account from the list that is displayed .

2.4.12.3 The use case continues at (2.2.4) within the account referral sub-flow.

3. Special Requirements – Referral UC

1. A contact must be selected for every Account that is selected as a Referral. NOTE: This is an Open Ticket requirement only. Reservations do not require a contact.

2. The valid Account Types that are displayed to the user in Search are :
   - Body Shop
   - Corporate
   - Government
   - Fleet
   - Dealership
   - Insurance
   - Other

3. For North America, the Branch Short List is currently being generated from the existing Legacy system and is being stored in a table on the Oracle database .

4. The system should not search or display for any deactivated or deleted accounts .

5. The user must have the ability to cancel a search at any time during the search .

6. An account and contact or an employee number must be selected before the user can complete an open ticket .

7. If a Fleet type Account is selected, the system should not allow the user to add a new contact.

8. The system must allow the user to select one Account Type or "All" during the Search .

9. When a user adds a new contact, that contact must be saved to the database and be available for selection for any future transactions .

4. Future Scope

- The ability to view Account Details. Account Details includes the 2 "Hot Lines", Products, Miscellaneous Information, Discounts and Rules as set up in SI.

5. Pre-Conditions

5.1 The user successfully initiated the Create Reservation Use Case

6. Post-Conditions

7. System Generated Notes –Referral

7.1 Notes should be generated when any of the following events occur

Event	Note Text	When to generate
The user changes the Referral Account	Referral Account "XXXXX" was changed to "XXXXXX"	Edit
The user changes the referral contact. (The referral account is the same)	Referral Contact "XXXX" was changed to "XXXX" for Referral Account "XXXX"	Edit
The user adds a "not on file" contact	Not on File Contact "First Name, Last Name" was added for Referral Account "XXXXX".	Create/Edit

8. Extension Points

9. Questions

Enterprise Rent-a- Car

ECARS 2.0 - Dates and Rates Screen Action Specification

Revision History

Date	Version	Description	Author
6/28/2001	1.0	Created Document	Johnny S. Johnston
7/03/2001	2.0	Revision after 1st review	Johnny S. Johnston
7/23/2001	2.1	Revision after 4th panel review.	Johnny S. Johnston
9/10/2001	2.2	Updated domain list order for Req. 7.1 and 13.1	L. Moellman
09/14/2001	2.3	Added Drop Charge field	James Atteberry

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Quote a Rate screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Dates and Rates - Screens

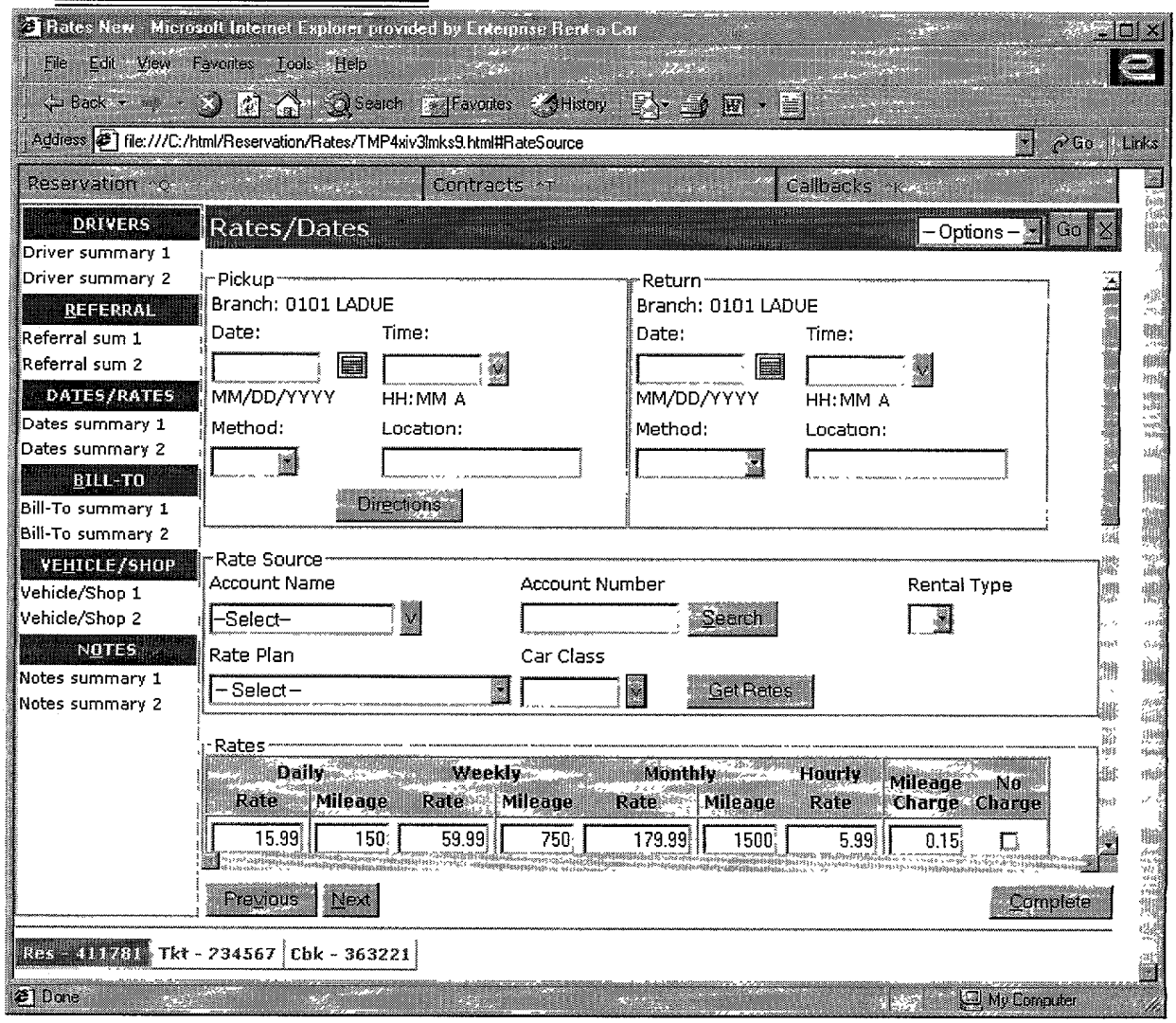

Figure 1 – Dates and Rates Screen – Top Portion

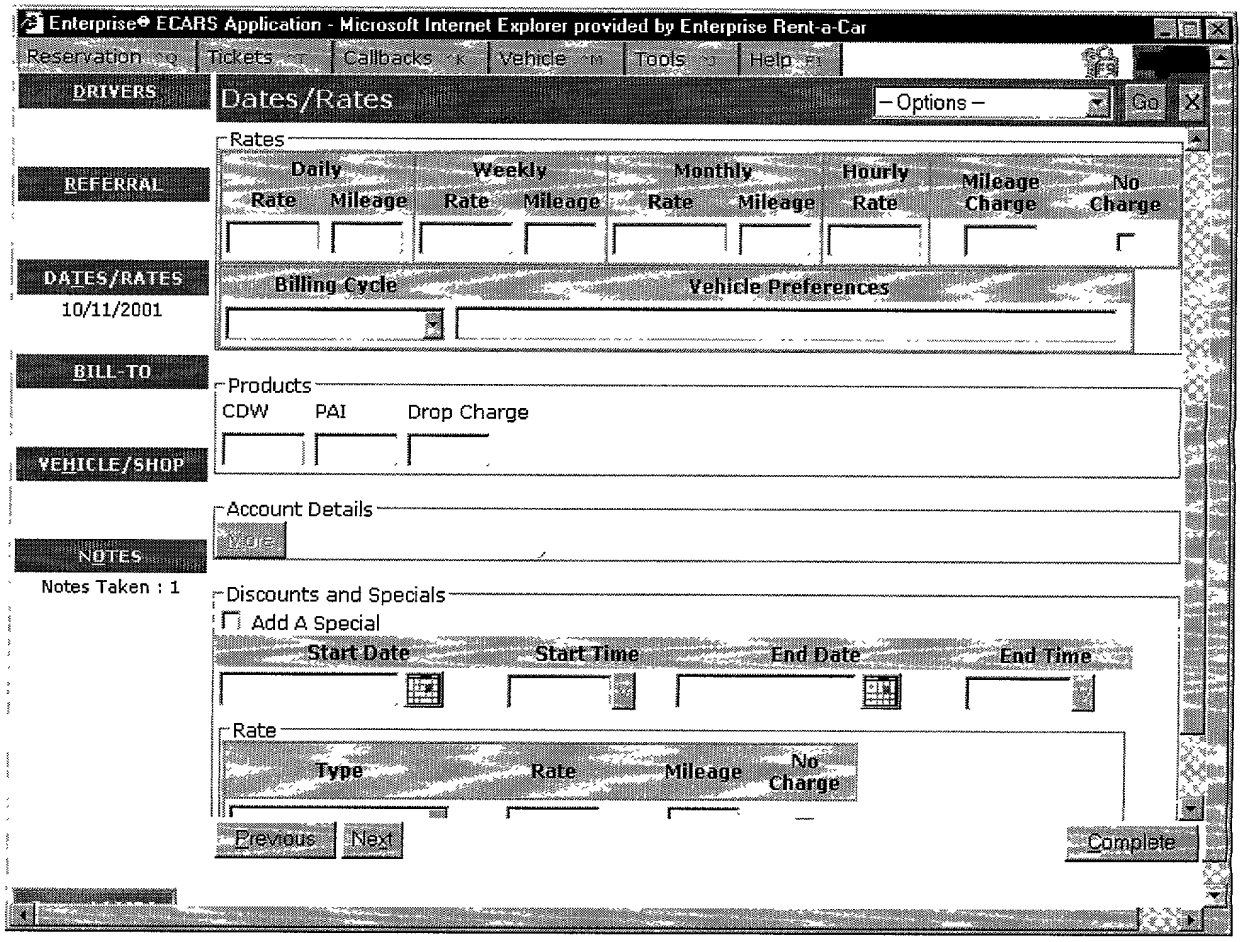

Figure 2 – Dates and Rates Screen – Middle Portion

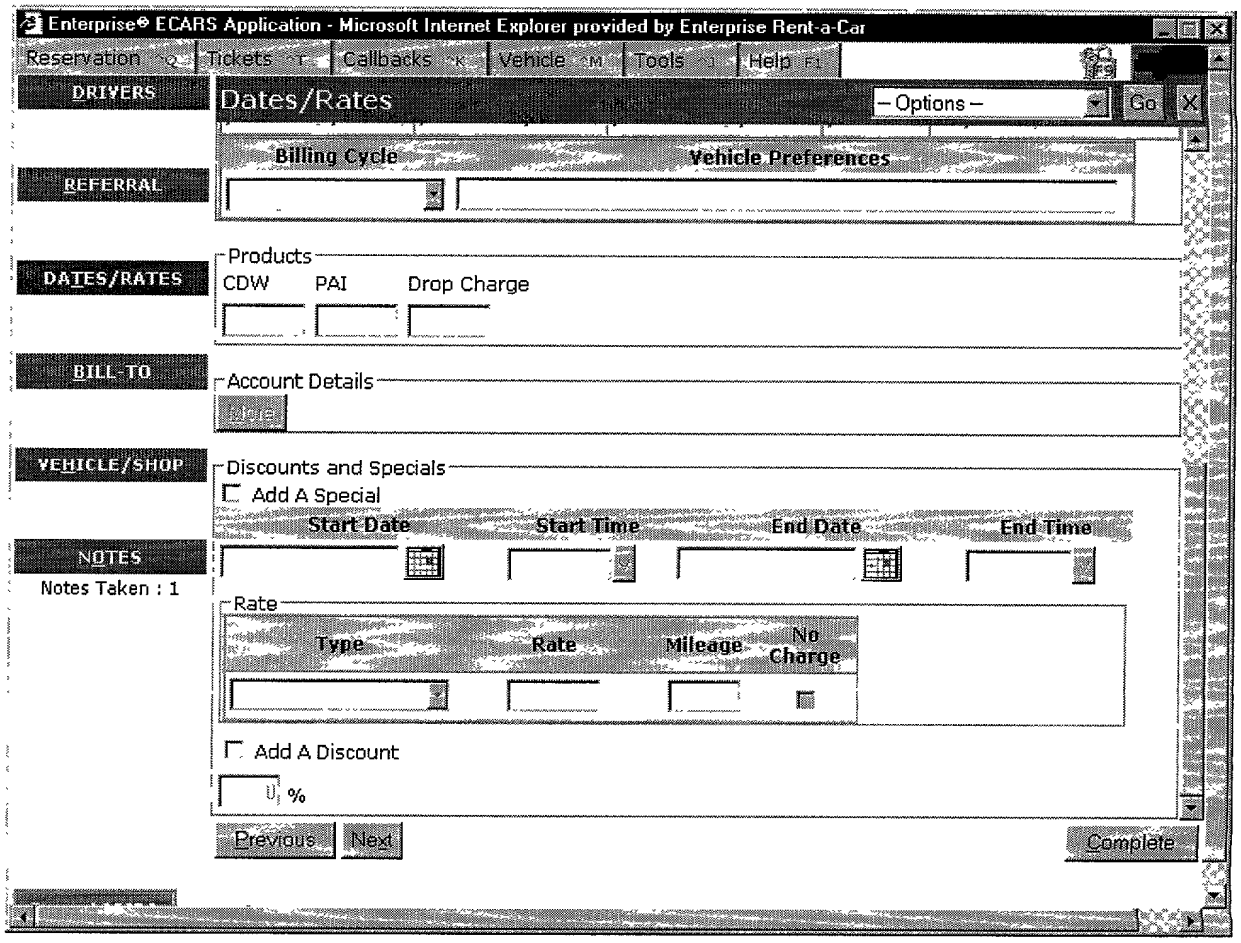

Figure 3 – Dates and Rates Screen – Bottom Portion

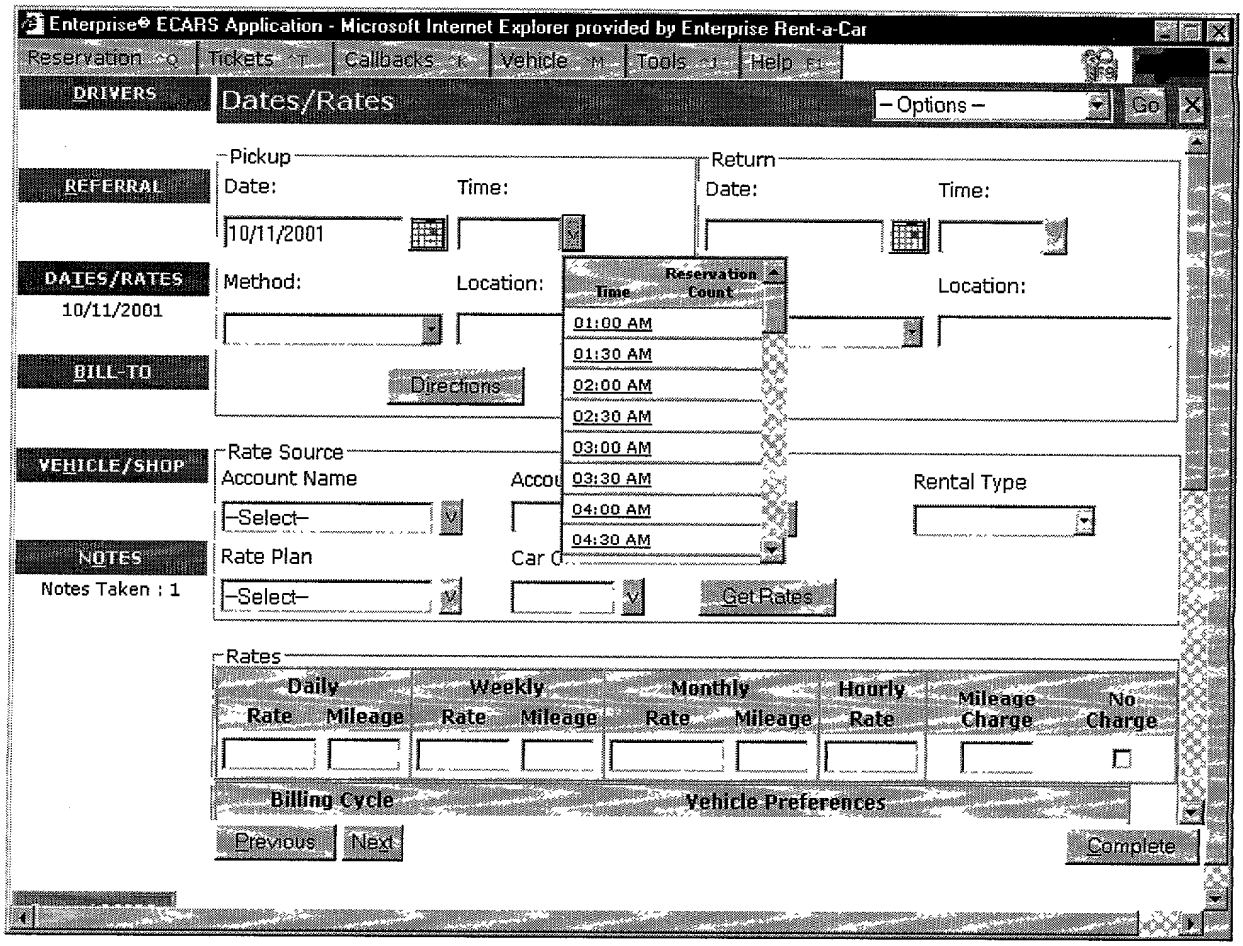

Figure 4 – Dates and Rates Screen – Pickup Time select box

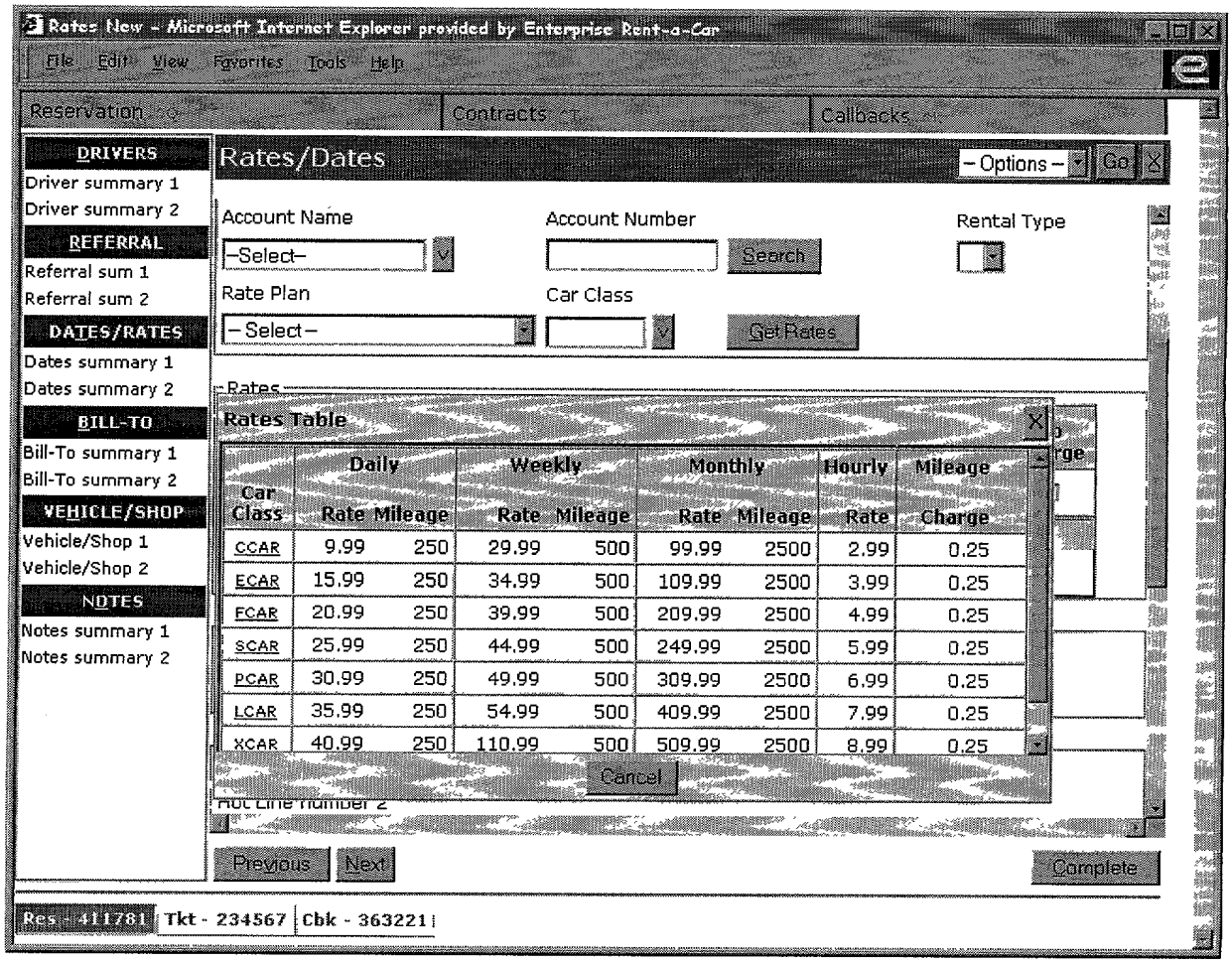

Figure 5 – Dates and Rates Screen – Rate plan pop-up box

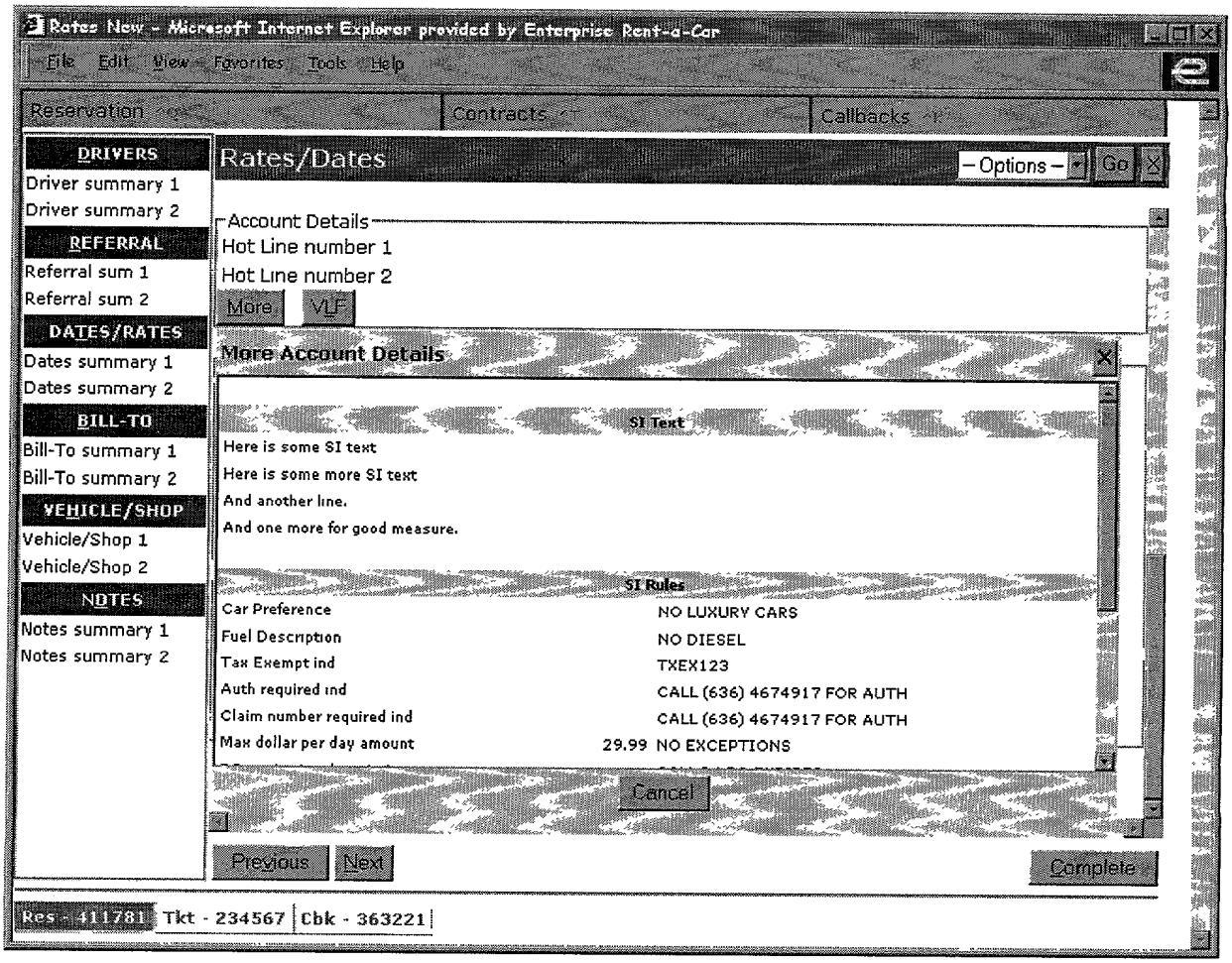

Figure 6 – Dates and Rates Screen – More Account Details pop-up box

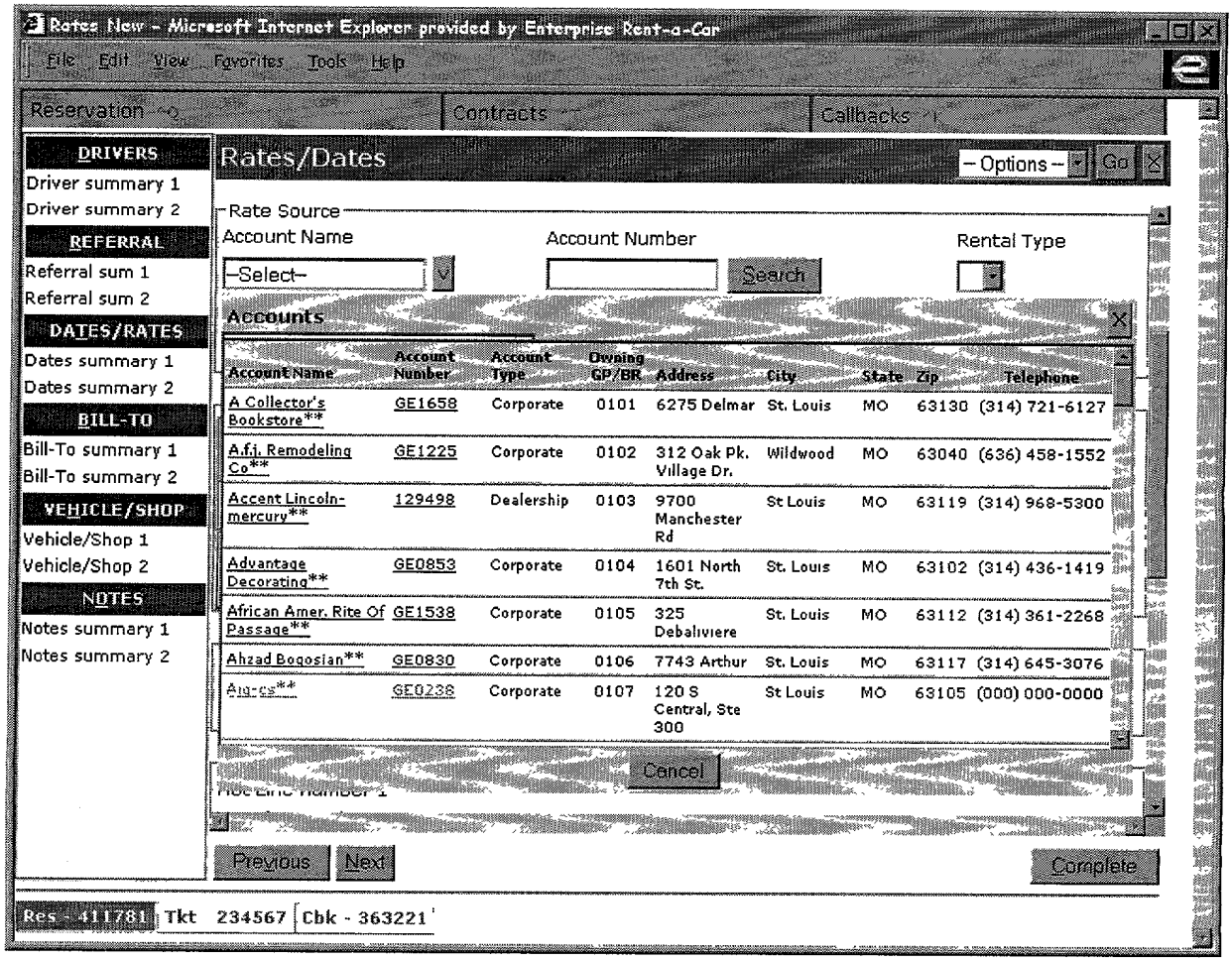

Figure 7 – Dates and Rates Screen – Account Name Drop Down List

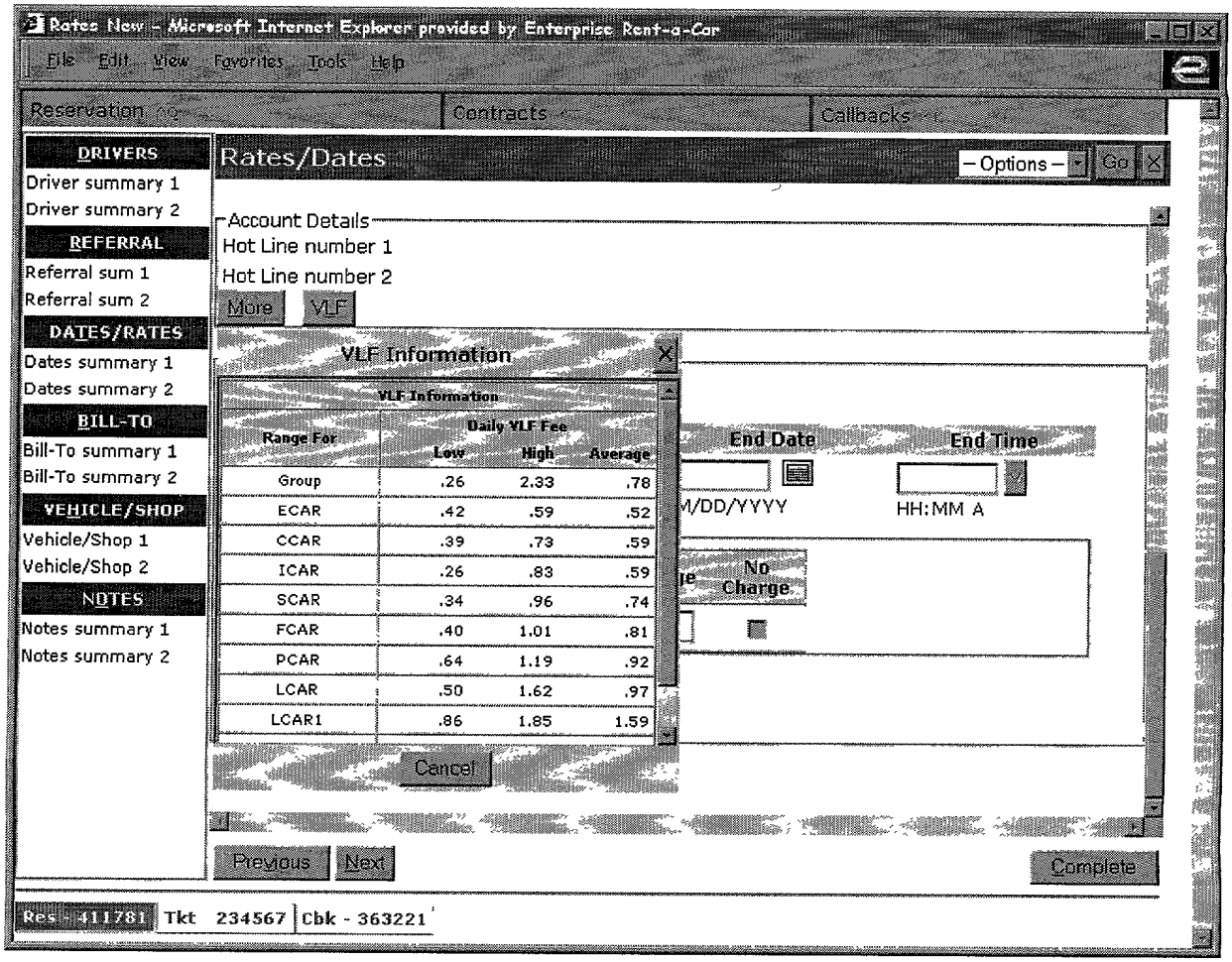

Figure 8 – Dates and Rates Screen – VLF Pop Up Box

3. Reservation Number

3.1 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation number will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message. See the error

message supplemental spec for exact text.

3.4 System Exceptions

None identified at this time.

4. Pickup Group/Branch Area

4.1 Behavior

This area is a display only field showing the group/branch currently selected as the Pickup group/branch. It is formatted with the legacy Group number, the legacy Branch number, a space, a dash, another space and the PeopleSoft description of the Branch.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Pick Up Date Area

5.1 Behavior

This area will be a numeric field. It will not be formatted for presentation purposes.
The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match. There should be a calendar function available which would allow the user to select a date from a calendar icon, or similar feature, instead of entering a value. If the user selects a date from the calendar icons, it will be displayed in the date area formatted appropriately by the locale. (As determined for all locale specific formatting.)

5.2 Validation

It will be a valid month, day and year combination. If the date is not valid, the system will display a message. See the error message supplemental spec for exact text.

5.3 Business Exceptions

If the user does not enter a date, then for the purpose of quoting a rate this should default to the current date, but do not save the current date in the database.
Pick-up date cannot be prior to the current date. If it is, display message to the user. Please see error message supplemental spec for exact text.

5.4 System Exceptions

If not a valid month, day and year combination, the normal date in error message should be displayed. See the error message supplemental spec for exact text.

6. Pick Up Time Area

6.1 Behavior

The pick-up time area will be disabled until there is and entry into the pick-up date area.

In locales where time is shown by AM PM designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute and

AM/PM designation, and a maximum of Hour Hour Minute Minute AM/PM designation.i.e. 945A, would designate 9:45 in the morning. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes **must** be two numeric values. The AM/PM designation of "A" or "P" must also be indicated. The user may enter delineating characters, but these will be removed before saving to the database.

In locales where time is shown by 24 hour designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute, and a maximum of Hour Hour Minute Minute, i.e. 945 would designate 9:45 in the morning, 1425 would designate 2:25 in the afternoon. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes must be **two** numeric values. The user may enter delineating characters, but these will be removed before saving to the database.

6.2 Validation

In locales where time is shown by AM PM designation:
Time increments can range from 1200A to 1159A and from 1200P until 1159P. If an entry is not within these two ranges display a message to the user. Please see the error message supplemental spec for exact text of message.

In locales where time is shown by 24 hour designation:
Time increments can range from 0000 to 2400. If an entry is not within this range display a message to the user. See the error message supplemental spec for exact text.

6.3 Business Exceptions

If no time is entered or selected this should be defaulted to the current time for the purpose of quoting a rate, but not saved to the database.

If the pick-up time is outside of the branch's operating hours, display a message tp the user. See Error Message Supplemental spec for exact text.

The pick-up time area will be disabled until there is and entry into the pick-up date area.

6.4 System Exceptions

None identified at this time.

7. Pick Up Time Drop Down

7.1 Behavior

The pick-up time dropdown will be disabled until there is and entry into the pick-up date area.

This drop down icon will display a multi-column combination box. It will display the time in 30 minute increments and the associated number of reservations. When selected, this should be positioned to 7:00 A.M. in the morning.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

If no time is entered or selected this should be defaulted to the current time for the purpose of quoting a

rate, but not saved to the database.

The pick-up time area will be disabled until there is and entry into the pick-up date area.

If the pick-up time is outside of the branch's operating hours, display a message to the user. See the error message supplemental spec for exact text.

7.4 System Exceptions

None identified at this time.

8. Pick Up Method Drop Down

8.1 Behavior

This will be a drop down are populated with the following values on the left. The right side is for information only.
Blank
CWC – Customer Will Call
DEL – Delivery
DEL/R – Delivery with Rideback
P/UP – Pick Up
W/IN – Walk In

8.2 Validation

Any one of the values is a valid selection.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time.

9. Pick Up Location Area

9.1 Behavior

This is a free form alphanumeric area.

9.2 Validation

None identified at this time.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

None identified at this time.

10. Pick Up Location Directions Button

10.1 Behavior

Selecting this button will display a free form alphanumeric pop-up box. The user may enter information and if the OK button is selected the system will save the information and close the pop-up box. If the user selects the cancel button, the pop-up box will be closed without any changes saved. The user may also "click" outside the pop-up box area, which will close the box without saving any changes.

10.2 Validation

None identified at this time.

10.3 Business Exceptions

None identified at this time.

10.4 System Exceptions

None identified at this time.

11. Return Group/Branch Area

11.1 Behavior

This area is a display only field showing the group/branch currently selected as the Return group/branch. It is formatted with the legacy Group number, the legacy Branch number, a space, a dash, another space and the PeopleSoft description of the Branch.

11.2 Validation

None identified at this time.

11.3 Business Exceptions

None identified at this time.

11.4 System Exceptions

None identified at this time.

12. Return Date Area

12.1 Behavior

This area will be a numeric field. It will not be formatted for presentation purposes.
The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match. There should be a calendar function available which would allow the user to select a date from a calendar icon, or similar feature, instead of entering a value. If the user selects a date from the calendar icons, it will be displayed in the date area formatted appropriately by the locale. (As determined for all locale specific formatting.)

12.2 Validation

It will be a valid month, day and year combination. See the error message supplemental spec for exact text.

12.3 Business Exceptions

If the user does not enter a date, then for the purpose of quoting a rate this should default to one calendar day after the pick-up date, but will not be saved to the database.

The return date cannot be before the pick-up date. If it is, display message to the user. See the error message supplemental spec for the exact text.

12.4 System Exceptions

If not a valid month, day and year combination, the normal date in error message should be displayed. See the error message supplemental spec for exact text.

13. Return Time Area

13.1 Behavior

The return time area will be disabled until there is and entry into the return date area.

In locales where time is shown by AM PM designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute and AM/PM designation, and a maximum of Hour Hour Minute Minute AM/PM designation.i.e. 945A, would designate 9:45 in the morning. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes **must** be two numeric values. The AM/PM designation of "A" or "P" must also be indicated. The user may enter delineating characters, but these will be removed before saving to the database.

In locales where time is shown by 24 hour designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute, and a maximum of Hour Hour Minute Minute, i.e. 945 would designate 9:45 in the morning, 1425 would designate 2:25 in the afternoon. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes must be **two** numeric values. The user may enter delineating characters, but these will be removed before saving to the database.

13.2 Validation

In locales where time is shown by AM PM designation:
Time increments can range from 1200A to 1159A and from 1200P until 1159P. If an entry is not within these two ranges display a message to the user. See the error message supplemental spec for exact text.

In locales where time is shown by 24 hour designation:
Time increments can range from 0000 to 2400. If an entry is not within this range display a message to the user. See the error message supplemental spec for exact text.

13.3 Business Exceptions

If no time is entered or selected this should be defaulted to the same time as the pick-up time for the purpose of quoting a rate but should not be saved to the database.

The return time area will be disabled until there is and entry into the return date area.

13.4 System Exceptions

None identified at this time.

14. Return Time Drop Down

14.1 Behavior

The return time dropdown will be disabled until there is and entry into the return date area.

This drop down icon will display the time in 15-minute increments. When selected, it should be positioned to the same time as the pick up time.

14.2 Validation

None identified at this time.

14.3 Business Exceptions

If no time is entered or selected this should be defaulted to the same time as the pick-up time for the purpose of quoting a rate, but not saved to the database.

The return time dropdown will be disabled until there is and entry into the return date area.

14.4 System Exceptions

None identified at this time.

15. Return Method Drop Down

15.1 Behavior

This will be a drop down list of the following values.
Blank
Branch
Drop
Ride Back

Note: In the U.K. the value of APU (Automatic Pick Up) will replace Drop.

15.2 Validation

Any one of the values is a valid selection.

15.3 Business Exceptions

None identified at this time.

15.4 System Exceptions

None identified at this time.

16. Return Location Area

16.1 Behavior

This is a free form alphanumeric area.

16.2 Validation

None identified at this time.

16.3 Business Exceptions

None identified at this time.

16.4 System Exceptions

None identified at this time.

17. Account Name Drop Down

17.1 Behavior

This area will be a drop down list of the Branch's short list, for North America. For everywhere else it will be the Group's Account list. If there are any of the following associated with the particular reservation, they will appear at the top or beginning of the list in the following order.
1) Any Bill-To Accounts
2) Any Referral Accounts – Excluding employees as a referral source.

3) Any Shop Accounts

The information displayed about an Account will be in the following order:

1) Account Name
2) Account Number
3) Rental Type
4) Owning Group/Branch
5) Address
6) City
7) State
8) Zip
9) Telephone

The Account Name in the display area will have a hyper-link which, when selected, will populate the Account Name, Account Number, Rental Type and Rate Plan areas on the Dates and Rates panel.

17.2 Validation

None identified at this time.

17.3 Business Exceptions

If Account name or number is selected and the following account types are determined, then other areas will be defaulted to the values shown.

Account Type	Rental Type	Billing Cycle
Insurance	Insurance	Calendar Day
Bodyshop	Bodyshop	Calendar Day
Dealership	Dealership	24 hour
Corporate	Corporate	24 hour
Government	Corporate	24 hour
Fleet	Corporate	24 hour
Other	Other	24 hour .

17.4 System Exceptions

None identified at this time.

18. Account Number Area

18.1 Behavior

This area will allow entry of alphanumeric values. When there is a match, the system will populate the Account Name, Account Number, Rental Type and Rate Plan areas on the Dates and Rates panel.

18.2 Validation

None identified at this time.

18.3 Business Exceptions

None identified at this time.

18.4 System Exceptions

None identified at this time.

19. Search Button

19.1 Behavior

Selecting this button will display the account search panel. See Referral Source Supplementary Specification for details.

19.2 Validation

None identified at this time.

19.3 Business Exceptions

None identified at this time.

19.4 System Exceptions

None identified at this time.

20. Rental Type Drop Down

20.1 Behavior

This area will be a drop down list of Rental types.

The domain values in the database are:

- Body Shop
- Corporate
- Dealership
- Insurance
- Other
- Retail
- Blank

See list in account name area for defaults, based on account.

It is also possible to leave the Account Name and Account Number areas blank and to select a Rental Type value from the drop down list and select the Get Rates Button. If this is performed, the system will get the Group/Branch default rates for the rental type selected and display this in the pop-up rate table display.

20.2 Validation

Any value selected is valid.

20.3 Business Exceptions

None identified at this time.

20.4 System Exceptions

None identified at this time.

21. Rate Plan Drop Down

21.1 Behavior

This area will be populated when an Account Name, Account Number or a Rental Type has been selected.

If there are multiple plans associated with an Account, it will list all of the rate plans associated with that Account, and the user must choose one. When there are multiple rate plans, the value "select" will appear in area so the user knows that there are multiple rate plans and selection of a single one is required.

If there is only a single rate plan associated with and Account then the rate plan pop-up box will appear show all of the car classes and rates associated with that account.

21.2 Validation

None identified at this time.

21.3 Business Exceptions

If no rate plans are associated with an Account then a message is displayed. See the error message supplemental spec for exact text.

21.4 System Exceptions

None identified at this time.

22. Car Class Drop Down

22.1 Behavior

This area will be a drop down list that also allows entry of alphanumeric values. The drop down list will be comprised of the most commonly used car classes, for North America. Europe will show all of the car classes associated with that country. The entry of alphanumeric values will be edited against a larger more comprehensive car class list.

Drop down list values for North America.

Class and Type

ECAR
CCAR
ICAR
SCAR
FCAR
PCAR
LCAR
MVAR
XFAR
XPAR
XXAR
XVAR

Drop down list values for Ireland.

Class and Type	Description (Information Only)

A	MINI
B	SUPERMINI
C	LOWER MEDIUM 1.3/1.4
D	LOWER MEDIUM 1.6
E	UPPER MEDIUM 1.8
F	UPPER MEDIUM 2.0
G	EXECUTIVE
MMPV	MINI MPV
MPV	MPV
SMPREM	SMALL PREMIUM
LGPREM	LARGE PREMIUM
EXPREM	EXECUTIVE PREMIUM
SPEC	SPECIALITY
CEST	LOWER MEDIUM 1.3/1.4 ESTATE
DEST	LOWER MEDIUM 1.6 ESTATE
EEST	UPPER MEDIUM 1.8 ESTATE
FEST	UPPER MEDIUM 2.0 ESTATE
GEST	EXECUTIVE ESTATE
SPREE	SMALL PREMIUM ESTATE
LPREE	LARGE PREMIUM ESTATE
SMCV	SMALL COMMERCIAL VAN
LGCV2	LG COMM VAN-LOW/MED ROOF/SWB
LGCV3	LG COMM VAN-HIGH ROOF/LWB
MBUS10	MINIBUS-10 SEAT
MBUS12	MINIBUS-12 SEAT
MBUS15	MINIBUS-15 SEAT
MBUS17	MINIBUS-17 SEAT
AA	MINI-AUTO GEARBOX
BA	SUPERMINI-AUTO GEARBOX
CA	LOWER MEDIUM 1.3/1.4-AUTO
DA	LOWER MEDIUM 1.6-AUTO

Class and Type	**Description (Information Only)**
EA	UPPER MEDIUM 1.8-AUTO
FA	UPPER MEDIUM 2.0-AUTO
GA	EXECUTIVE-AUTO GEARBOX
MMPVA	MINI MPV-AUTO GEARBOX
MPVA	MPV-AUTO GEARBOX
SPREA	SMALL PREMIUM-AUTO GEARBOX
LGPREA	LARGE PREMIUM-AUTO GEARBOX
EXPREA	EXEC PREMIUM-AUTO GEARBOX
SPECA	SPECIALTY-AUTO GEARBOX
CESTA	LOWER MEDIUM 1.3/1/4 EST-AUTO
DESTA	LOWER MEDIUM 1.6 ESTATE-AUTO
EESTA	UPPER MEDIUM 1.8 EST-AUTO
FESTA	UPPER MEDIUM 2.0 ESTATE-AUTO
GESTA	EXECUTIVE ESTATE-AUTO
SPREEA	SMALL PREMIUM ESTATE-AUTO
LPREEA	LARGE PREMIUM ESTATE-AUTO

Drop down list values for U.K.

Class and Type	Description (Information Only)
A	MINI
B	SUPERMINI
C	LOWER MEDIUM 1.3/1.4
D	LOWER MEDIUM 1.6
E	UPPER MEDIUM 1.8
F	UPPER MEDIUM 2.0
G	EXECUTIVE
MMPV	MINI MPV
MPV	MPV
SMPREM	SMALL PREMIUM
LGPREM	LARGE PREMIUM
EXPREM	EXECUTIVE PREMIUM
SPEC	SPECIALITY
CEST	LOWER MEDIUM 1.3/1.4 ESTATE
DEST	LOWER MEDIUM 1.6 ESTATE
EEST	UPPER MEDIUM 1.8 ESTATE
FEST	UPPER MEDIUM 2.0 ESTATE
GEST	EXECUTIVE ESTATE
SPREE	SMALL PREMIUM ESTATE
LPREE	LARGE PREMIUM ESTATE
SMCV	SMALL COMMERCIAL VAN
LGCV2	LG COMM VAN-LOW/MED ROOF/SWB
LGCV3	LG COMM VAN-HIGH ROOF/LWB
MBUS10	MINIBUS-10 SEAT

Drop down list values for U.K.

Class and Type	Description (Information Only)
MBUS12	MINIBUS-12 SEAT
MBUS15	MINIBUS-15 SEAT
MBUS17	MINIBUS-17 SEAT
AA	MINI-AUTO GEARBOX
BA	SUPERMINI-AUTO GEARBOX
CA	LOWER MEDIUM 1.3/1.4-AUTO
DA	LOWER MEDIUM 1.6-AUTO
EA	UPPER MEDIUM 1.8-AUTO
FA	UPPER MEDIUM 2.0-AUTO
GA	EXECUTIVE-AUTO GEARBOX
MMPVA	MINI MPV-AUTO GEARBOX
MPVA	MPV-AUTO GEARBOX
SPREA	SMALL PREMIUM-AUTO GEARBOX
LGPREA	LARGE PREMIUM-AUTO GEARBOX
EXPREA	EXEC PREMIUM-AUTO GEARBOX
SPECA	SPECIALTY-AUTO GEARBOX
CESTA	LOWER MEDIUM 1.3/1/4 EST-AUTO

DESTA	LOWER MEDIUM 1.6 ESTATE-AUTO
EESTA	UPPER MEDIUM 1.8 EST-AUTO
FESTA	UPPER MEDIUM 2.0 ESTATE-AUTO
GESTA	EXECUTIVE ESTATE-AUTO
SPREEA	SMALL PREMIUM ESTATE-AUTO
LPREEA	LARGE PREMIUM ESTATE-AUTO

Drop down list values for Germany

Class and Type	**Description (Information Only)**
A	MINI
B	SUPERMINI
C	LOWER MEDIUM
D	PREM LOWER MED
E	UPPER MEDIUM
F	PREM UPPER MED
G	PREMIUM EXECUTIVE
H	LUXURY
CKOM	LOWER MED KOMBI
EKOM	UPPER MEDIUM KOMBI
FKOM	PREM UPPER MED KOMBI
GKOM	PREMIUM EXECUTIVE KOMBI
AA	MINI-AUTOMATIK
BA	SUPERMINI-AUTOMATIK
CA	LOWER MEDIUM-AUTOMATIK
DA	PREM LOWER MED-AUTOMATIK
EA	UPPER MEDIUM-AUTOMATIK
Class and Type	**Description (Information Only)**
FA	PREM UPPER MED-AUTOMATIK
GA	PREMIUM EXECUTIVE-AUTOMATIK
HA	LUXURY-AUTOMATIK
MMPV	MINI MINIVAN
MPV	MINIVAN
SPEC	CABRIO SPECIALTY
SMTR	SMALL TRANSPORTER
LGTR1	LARGE TRANSPORTERS-SWB
LGTR2	LG TRANSPORTERS-HI ROOF/LWB
4WD	4WD SPORT UTILITY
SM4W	SMALL 4WD SPORT UTILITY
MMPVA	MINI MINIVAN-AUTOMATIK
MPVA	MINIVAN-AUTOMATIK
4WDA	4WD SPORT UTILITY-AUTOMATIK
SM4WA	SMALL 4WD SPORT UTIL-AUTOMATIK
SPECA	CABRIO SPECIALTY-AUTOMATIK
CKOMA	LOWER MED KOMBI-AUTOMATIK
EKOMA	UPPER MEDIUM KOMBI-AUTOMATIK
FKOMA	PREM UPPER MED KOMBI-AUTOMATIK

GKOMA PREM EXEC KOMBI-AUTOMATIK

22.2 Validation

None identified at this time.

22.3 Business Exceptions

If the values entered are not one of the ones listed below, a message is displayed. See the error message supplemental spec for exact text.

Car Class Edit List of Values for North America.

Class and Type
MCAR
MBAR
MDAR
MXAR
MSAR
MTAR
MWAR
MVAR
MFAR
MPAR
ECAR
EBAR
EDAR
EXAR
ESAR
ETAR
EWAR
EVAR
EFAR
EPAR
CCAR
CBAR
CDAR
CXAR
CSAR
CTAR
CWAR
CVAR
CFAR
CPAR
ICAR
IBAR
IDAR
IXAR
ISAR
ITAR
IWAR
IVAR
IFAR
IPAR

SCAR
SBAR
SDAR
SXAR
SSAR
STAR
SWAR
SVAR
SFAR
SPAR
FCAR
FBAR
FDAR
FXAR
FSAR
FTAR
FWAR
FVAR
FFAR
FPAR
PCAR
PBAR
PDAR
PXAR
PSAR
PTAR
PWAR
PVAR
PFAR
PPAR
LCAR
LBAR
LDAR
LXAR
LSAR
LTAR
LWAR
LVAR
LFAR
LPAR
XCAR
XBAR
XDAR
XXAR
XSAR
XTAR
XWAR
XVAR
XFAR
XPAR

22.4 System Exceptions

None identified at this time.

23. Get Rates Button

23.1 Behavior

Selection of this button will have the system execute a search for rate plans associated with the information entered. No rate tables will display for a rate search until the Get Rates Button is pressed.

23.2 Validation

None identified at this time.

23.3 Business Exceptions

At a minimum there must be an Account Name or an Account Number to search for rates. If the user selects this button without one of these a message is displayed. See the error message supplemental spec for exact text.

23.4 System Exceptions

None identified at this time.

24. Rate Plan – Pop-Up Display Area

24.1 Behavior

- This is a pop-up window that will display the rates of a rate plan associated with an Account. Information displayed is:

Rate pop-up box columns and information:

- Car Class
- Daily – Rate and Mileage
- Weekly – Rate and Mileage
- Monthly – Rate and Mileage
- Hourly - Rate
- Mileage Charge

Car class will have a hyper-link which will allow the user to select the rate they want. This will then populate the rates display area on the Dates and Rates panel.

24.2 Validation

None identified at this time.

24.3 Business Exceptions

If an Account has more than one rate plan associated with it, then this information cannot be displayed until the Rate Plan area has a value.

If an Account has a single rate plan associated with it, then this information is displayed after the Account Name is selected or an Account Number is entered and the Get Rates Button is pressed.

If an Account has a single rate plan and there is a value in the Car Class area, and that car class is in the rate plan and the Get Rates Button is peressed, then the rates display area of the Dates and Rates panel is populated with the appropriate information and the rate plan pop-up window is NOT displayed.

If an Account has multiple rate plans and there is a value in the Car Class area, and there is not a value in Rate Plan area, a message should display to the user. See the error message supplemental spec for exact text.

If an Account has a multiple rate plans, and there is a value in the Rate Plan area and there is a value in the Car Class area, and that car class is in the rate plan, then the rates display area of the Dates and Rates panel is populated with the appropriate information and the rate plan pop-up window is NOT displayed.

If an Account has a single rate plans, and there is a value in the Car Class area, but that car class is not in the rate plan, then a message is displayed. See the error message supplemental spec for exact text.

If an Account has a multiple rate plans, and there is a value in the Rate Plan area and there is a value in the Car Class area, but that car class is not in the rate plan, then a message is displayed. See the error message supplemental spec for exact text.

24.4 System Exceptions

None identified at this time

25. Rate Plan – Display Area

25.1 Behavior

This is a display area that allows the user to manually enter rates or can be populated by the system once the user has determined a set of rates to be used for the reservation.

The fields available to the user are:

- Daily Rate
- Daily Mileage
- Weekly Rate
- Weekly Mileage
- Monthly Rate
- Monthly Mileage
- Hourly Rate
- Mileage Charge
- No Charge Check Box

All of the information presented has the ability to be edited or changed.

There is an interaction between the Mileage Charge and the No Charge Check Box. If the No Charge Check Box is selected, then the Mileage Charge is set to zero and the area disabled. Unselecting the No Charge Check Box will enable the Mile Charge area for entering values.

25.2 Validation

None identified at this time.

25.3 Business Exceptions

Negative values may not be entered. If attempted, display message. See the error message supplemental

spec for exact text.

25.4 System Exceptions

None identified at this time

26. Billing Cycle Drop Down

26.1 Behavior

This area will initially default to the billing cycle associated with the Account and Rate Plan selected. It may be changed to anther value.
Drop down domain values are Blank, 24 Hour and Calendar Day.

26.2 Validation

None identified at this time.

26.3 Business Exceptions

See list in account name area for defaults, based on account. If the user or system selects "Calendar day" as a value in this field, the hourly rate field must be disabled. If the user or system changes the value to either blank or 24 hour, the hourly rate field must be enabled again.

26.4 System Exceptions

None identified at this time

27. Vehicle Preferences Area

27.1 Behavior

This area will allow entry of alphanumeric values.

27.2 Validation

None identified at this time.

27.3 Business Exceptions

None identified at this time

27.4 System Exceptions

None identified at this time

28. Products - CDW Area

28.1 Behavior

This area will allow the user to enter a currency value for CDW. If the user has selected an account, and the account has values for CDW, these should be populated in the area as well. The user can change or remove the values at anytime.

28.2 Validation

None identified at this time.

28.3 Business Exceptions

Negative values may not be entered. If attempted, display message. See the error message supplemental spec for exact text.

28.4 System Exceptions

None identified at this time

29. Products - PAI Area

29.1 Behavior

This area will allow the user to enter a currency value for PAI. If the user has selected an account, and the account has a value for PAI, this value should be populated into the area. If a value already exists, the new value will overwrite the existing value. The user can change or remove the value at anytime.

29.2 Validation

None identified at this time.

29.3 Business Exceptions

Negative values may not be entered. If attempted, display message. See the error message supplemental spec for exact text.

29.4 System Exceptions

None identified at this time

30. Products – Drop Charge area

30.1 Behavior

The area will allow the user to enter a drop charge for the reservation. It may be changed for edited.

30.2 Validation

None identified at this time.

30.3 Business Exceptions

A numeric value greater than or equal to zero must be entered.

30.4 System Exceptions

None identified at this time.

31. Account Details Area

31.1 Behavior

This area will display the two "hot lines" from legacy Special Instructions associated with a rate plan for an Account. It is a display only area.

31.2 Validation

None identified at this time.

31.3 Business Exceptions

None identified at this time.

31.4 System Exceptions

None identified at this time.

32. Account Details "More" Button

32.1 Behavior

Selection of this button will display a pop-up box which will display all of the SI detail associated with a rate plan for an Account.

32.2 Validation

None identified at this time.

32.3 Business Exceptions

None identified at this time.

32.4 System Exceptions

None identified at this time.

33. VLF Button

33.1 Behavior

Selection of this button will display a pop-up box which will display all of the Vehicle License Fee information which must be given to a renter in certain states.

33.2 Validation

None identified at this time.

33.3 Business Exceptions

None identified at this time.

33.4 System Exceptions

None identified at this time.

34. Discount and Specials – Add a Special Check Box

34.1 Behavior

Selection of this check box will enable all of the "Special" input areas.

34.2 Validation

None identified at this time.

34.3 Business Exceptions

In order to have a special, a billing cycle must be specified. If this is checked, and billing cycle is blank, display a message. See the error message supplemental spec for exact text.

34.4 System Exceptions

None identified at this time.

35. Special – Start Date Area

35.1 Behavior

This area will be a numeric field. It will not be formatted for presentation purposes.
The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match. There should be a calendar function available which would allow the user to select a date from a calendar icon, or similar feature, instead of entering a value. If the user selects a date from the calendar icons, it will be displayed in the date area formatted appropriately by the locale. (As determined for all locale specific formatting.)

35.2 Validation

It will be a valid month, day and year combination.

35.3 Business Exceptions

If there is a Pick-Up date entered then the Special Start date cannot be prior to the Pick-up date. If it is, display a message. See the error message supplemental spec for exact text.

If there is no Pick-up date, then the Start date cannot be prior to the current date. If it is, display a message. See the error message supplemental spec for exact text.

All of date and time fields are required for a special. If a Start date not entered, display a message. See the error message supplemental spec for exact text.

35.4 System Exceptions

If not a valid month, day and year combination, the normal date in error message should be displayed. See the error message supplemental spec for exact text. cu

36. Special – Start Time Area

36.1 Behavior

The start time area will be disabled until there is and entry into the start date area.

In locales where time is shown by AM PM designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute and AM/PM designation, and a maximum of Hour Hour Minute Minute AM/PM designation.i.e. 945A, would designate 9:45 in the morning. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes **must** be two numeric values. The AM/PM designation of "A" or "P" must also be indicated. The user may enter delineating characters, but these will be removed before saving to the database.

In locales where time is shown by 24 hour designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute, and a maximum of Hour Hour Minute Minute, i.e. 945 would designate 9:45 in the morning, 1425 would designate 2:25 in the afternoon. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes must be **two** numeric values. The user may enter delineating characters, but these will be removed before saving to the database.

36.2 Validation

In locales where time is shown by AM PM designation:
Time increments can range from 1200A to 1159A and from 1200P until 1159P. If an entry is not within these two ranges display. See the error message supplemental spec for exact text.

In locales where time is shown by 24 hour designation:
Time increments can range from 0000 to 2400. If an entry is not within this range display a message to the user. See the error message supplemental spec for exact text.

36.3 Business Exceptions

The start time area will be disabled until there is and entry into the start date area.

36.4 System Exceptions

None identified at this time.

37. Special - Start Time Drop Down

37.1 Behavior

The start time dropdown will be disabled until there is and entry into the start date area.

This drop down icon will display the time in 15-minute increments. When selected, it should be positioned to the ¼ hour increment immediately preceding the current time and format according to the locale's format.

37.2 Validation

None identified at this time.

37.3 Business Exceptions

The start time dropdown will be disabled until there is and entry into the start date area.

37.4 System Exceptions

None identified at this time.

38. Special – End Date Area

38.1 Behavior

This area will be a numeric field. It will not be formatted for presentation purposes. The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match. There should be a calendar function available which would allow the user to select a date from a calendar icon, or similar feature, instead of entering a value. If the user selects a date from the calendar icons, it will be displayed in the date area formatted appropriately by the locale. (As determined for all locale specific formatting.)

38.2 Validation

It will be a valid month, day and year combination.

38.3 Business Exceptions

Special End date cannot be prior to the Special Start date. If it is, display a message. See the error message supplemental spec for exact text.

If there is a Return date then the Special End date cannot be after the Return date. If it is, display a message. See the error message supplemental spec for exact text.

If there is not a Return date, then Special End date may be any value equal to or after Special Start date.

All of date and time fields are required for a special. If a Start date not entered, display a message. See the error message supplemental spec for exact text.

38.4 System Exceptions

If not a valid month, day and year combination, the normal date in error message should be displayed. See the error message supplemental spec for exact text.

39. Special – End Time Area

39.1 Behavior

The end time area will be disabled until there is and entry into the end date area.

In locales where time is shown by AM PM designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute and AM/PM designation, and a maximum of Hour Hour Minute Minute AM/PM designation.i.e. 945A, would designate 9:45 in the morning. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes **must** be two numeric values. The AM/PM designation of "A" or "P" must also be indicated. The user may enter delineating characters, but these will be removed before saving to the database.

In locales where time is shown by 24 hour designation:
This is an alphanumeric area. A valid entry to this area is a minimum of Hour Minute Minute, and a maximum of Hour Hour Minute Minute, i.e. 945 would designate 9:45 in the morning, 1425 would designate 2:25 in the afternoon. A leading zero may precede the hour, but is not required and will be removed before saving to the database. The minutes must be **two** numeric values. The user may enter delineating characters, but these will be removed before saving to the database.

39.2 Validation

In locales where time is shown by AM PM designation:
Time increments can range from 1200A to 1159A and from 1200P until 1159P. If an entry is not within these two ranges display a message to the user. See the error message supplemental spec for exact text.

In locales where time is shown by 24 hour designation:
Time increments can range from 0000 to 2400. If an entry is not within this range display a message to the user. See the error message supplemental spec for exact text.

39.3 Business Exceptions

The end time area will be disabled until there is and entry into the end date area.

39.4 System Exceptions

None identified at this time.

40. Special – End Time Drop Down

40.1 Behavior

The end time dropdown will be disabled until there is and entry into the end date area.
This drop down icon will display the time in 15-minute increments. When selected, it should be positioned to the ¼ hour increment immediately preceding the current time and format according to the locale's format.

40.2 Validation

None identified at this time.

40.3 Business Exceptions

The end time dropdown will be disabled until there is and entry into the end date area.

40.4 System Exceptions

None identified at this time.

41. Special – Rate Area

41.1 Behavior

This is a numeric area.

41.2 Validation

None identified at this time.

41.3 Business Exceptions

Negative values may not be entered. If attempted, display message. See the error message supplemental spec for exact text.

41.4 System Exceptions

None identified at this time

42. Special – Rate Type Drop Down

42.1 Behavior

This is a drop down list. The domain values are Per Day Special and Package Special.

42.2 Validation

None identified at this time.

42.3 Business Exceptions

None identified at this time.

42.4 System Exceptions

None identified at this time

43. Special – Mileage Area

43.1 Behavior

This is a numeric area. This area will be disabled if the No Charge check box is selected. If not selected the area is enabled. It should default to enabled.

43.2 Validation

None identified at this time.

43.3 Business Exceptions

Negative values may not be entered. If attempted, display message. See the error message supplemental spec for exact text.

43.4 System Exceptions

None identified at this time.

44. Special – Mileage No Charge Check Box

44.1 Behavior

If the No Charge Check Box is selected, then the Mileage area is set to zero and the area disabled. Unselecting the No Charge Check Box will enable the Mile area for entering values.

44.2 Validation

None identified at this time.

44.3 Business Exceptions

If there is unlimited mile in the normal rate then special mileage has to be unlimited. You can never have a special mileage charge if the normal rate is unlimited. If the user attempts to so this, display a message. See the error message supplemental spec for exact text.

44.4 System Exceptions

None identified at this time

45. Discounts and Specials – Add a Discount Check Box

45.1 Behavior

Selection of this check box will enable the "Discount %" input area.

45.2 Validation

None identified at this time.

45.3 Business Exceptions

None identified at this time.

45.4 System Exceptions

None identified at this time

46. Discount – Discount Percent Area

46.1 Behavior

This is a numeric area. Values should be entered without any decimals, i.e., a value of 8 would men 8%, a value of 20 would be 20%.

46.2 Validation

Values cannot contain decimals.

46.3 Business Exceptions

A discount cannot exceed the value of 50. If the user enters a value greater than 50, a message is displayed. See the error message supplemental spec for exact text.

46.4 System Exceptions

If a value is entered with decimals, a message is displayed. See the error message supplemental spec for exact text.

47. Security

The user must have the appropriate security level to access these screens. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

48. Special – Excess Mileage Charge

48.1 Behavior

This is a numeric area. Values should be entered without any decimals i.e. a value of 8 would mean .08 and a value of 20 would mean .20.

48.2 Validation

Values cannot contain decimals .

48.3 Business exceptions

48.4 System Exceptions

If a value is entered that contains decimals, the system will display a message to the user. See the error message supplemental spec for exact text.

<Company Name>

ECARS 2.0 - Other Address Screen Action Specification

Revision History

Date	Version	Description	Author
6/12/01	1.1	Created Document	Johnny S. Johnston
09/04/2001	1.2	Updated due to changes from Navigation use case.	James Atteberry

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Other Address screen.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Other Address Screen

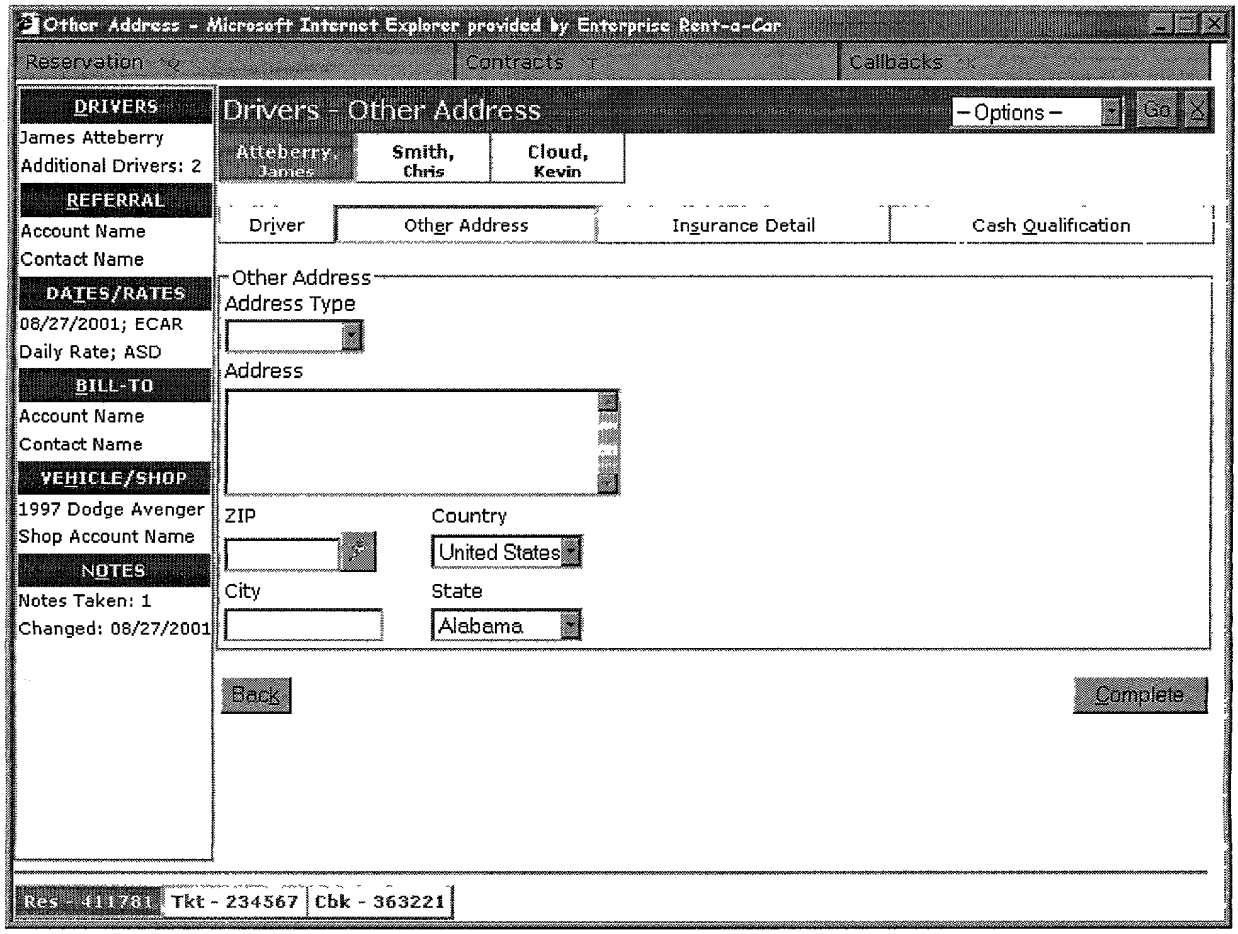

Figure 1 – Other Address Screen

3. Reservation Number

3.1 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation number will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message stating "A maximum of 3 reservations may be displayed".

3.4 System Exceptions

None identified at this time.

4. Other Address Title Bar Area

4.1 Behavior

The option area in the title bar will allow the user to access transaction-wide functions. These functions for Reservation are: -- Options --, Print, Void and Transfer. The default option is "—Options –". The user must press the Go button to initiate the selected function.

The button area in the title bar contains two buttons – a Go button and a Close button.

The Go button is always active, and is used to initiate a function selected in the option area. If the selected option is "—Options –", nothing should happen.

The Close button is always active and is used to close the current transaction. The button is labeled with an 'X'. Pressing this button will cause a confirmation popup, asking the user if they wish to cancel the transaction and lose all changes. If the user selects 'No', they are returned to the same screen. If the user selects 'Yes', the transaction is closed with no changes saved to the database and the user is taken to the Reservation home page.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Driver Tab Navigation Area

5.1 Behavior

This area contains a tab for each driver on the transaction. The first tab is the primary renter, with all other tabs being additional drivers. The name on the tab will be the Last Name on the top and the First Name on the bottom of the tab.

By clicking on a tab, the main driver screen for that driver will be brought up.

5.2 Validation

5.3 Business Exceptions

5.4 System Exceptions

6. Driver Navigation Area

6.1 Behavior

This area gives the user the ability to move to any screen within the Driver area. Each screen within the Driver area is connected by a hyperlink. The screens that have been defined are: Driver, Other Address, Insurance Detail, and Cash Qualification. A hyperlink will NOT be available for the screen that is currently displayed.

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. Other Address Area

7.1 Behavior

This area is a free form alphanumeric area.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Other Address Type Area

8.1 Behavior

This search criteria area will be a drop-down box. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first state beginning with "H" in the list. Valid values are Home, Business, Local and Other.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time

9. City, State, Zip Code and Country, and City Other, State Other, Zip Code Other and Country Other Areas

9.1 Behavior

These behaviors are detailed out in the Geo-Framework Search Screen Spec

9.2 Validation

None identified at this time.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

None identified at this time.

10. Button Line Area

10.1 Behavior

The Back button will take the user back to the main driver screen for the currently selected driver. The Complete button will initiate a save of the transaction. All validations will be performed, returning any errors to the user. If there are no errors, the transaction is written to the database and the user is returned to the Reservation home page.

10.2 Validation

None identified at this time.

10.3 Business Exceptions

None identified at this time.

10.4 System Exceptions

None identified at this time.

11. Rules

None identified at this time.

12. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

<Enterprise Rent A Car>

ECARS 2.0 Reservation
Use Case Specification: Reservation Number Fast Path

Version <1.0>

Revision History

Date	Version	Description	Author
<17/04/01>	<1.0>	<First draft of Fast Path>	<J. Gaines>
18/04/01	1.1	1st revision per Tim Erickson's feedback on wording	J. Gaines

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Use Case Specification: Reservation Number Fast Path

1. Reservation Number Fast Path

1.1 Brief Description

1.1.1 This use case describes how the user interacts with a system to search for and locate a reservation that is displayed in edit/view mode, using Fast Path. The use case shows the flow of events that occur when conducting a Fast Path Search. The system will search for, locate and display, in edit/view mode, a reservation based on an exact match of the reservation number entered by the user.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when a user chooses to search for a reservation.

2.1.2 The user enters a reservation number in the Reservation Number field . The system searches for an exact match on the number entered .

2.1.3 The system initiates the Search Engine Use Case using the reservation number entered. The system searches for an exact match on the text starting from the first position in the field

2.1.4 The system receives the appropriate processing information from the Search Engine use case. If the search returned no records, the use case continues at alternate flow (No Matches). If the search returned more than one record, the use case continues at alternate flow (Multiple Matches). If the search has exceeded the time allotted, the use case continues at alternate flow (Time Out). Otherwise, the use case continues along the main flow.

2.1.5 The system initiates the Edit/View use case to displays the details of the reservation to the user.

Note: From within the Edit/View use case, the user can perform the following options :

- If the user chooses to print the reservation , the use case continues at alternate flow (Print the Reservation Details).
- If the user chooses to edit the reservation , the reservation continues at alternate flow (Edit a Reservation).

2.1.6 The use case ends.

2.2 Alternative Flows

2.2.1 No Matches

2.2.1.1 From the basic flow (2.1.5), the system prompts the user that there were no records that matched the reservation number entered . Once the user acknowledges the prompt, the use case continues at (2.1.1) of the basic flow.

2.2.2 Multiple Matches

2.2.2.1 From the basic flow (2.1.4), the use case displays the results of the search according to the Default Sort Order (defined in the Search Reservation use case):

- Pick up Group (ascending). Concatenate pick up group and branch.
- Pick up Branch (ascending)
- Date (ascending)
- Time (ascending)
- Renter Name (ascending) (Last name, First name) This is format that renter name will display in the summary list
- Pick Up Method
- Car Class
- Reservation Type
- Reservation Number

2.2.2.2 Sort order for Date and Time Headers:

- Reservations with a date but no time.
- Reservations with a date and time.
- Reservations with no date but have a time.
- Reservations with no date and no time.

2.2.3 The user selects a single reservation to edit/view from the list of reservation matches displayed.

2.2.4 The system initiates the Edit/View use case to displays the details of the reservation to the user.

Note: From within the Edit/View use case, the user can perform the following options:

- If the user chooses to print the reservation, the use case continues at alternate flow (Print the Reservation Details).
- If the user chooses to edit the reservation, the reservation continues at alternate flow (Edit a Reservation).

2.2.5 Time Out.

2.2.5.1 The system displays a message to the user that the time allotted to search has been exceeded.

2.2.5.2 The system prompts the user to choose one of the following options:

- Quit the search and display none of the matches so far. Then the use case ends.
- Quit the search and display the matches found so far.
- Continue searching.

2.2.5.3 If the user chooses to quit the search and not display the matches, the use case continues at (2.1.1) in the basic flow. If the user elects to quit the search and display the matches found, the use case continues at (2.1.4) of the Multiple Matches Alternative flow. If the user elects to continue the search, the use case continues at (2.1.3) of the basic flow.

3. Special Requirements

3.1 < First Special Requirement >

4. Pre-Conditions

4.1 The user has successfully logged onto the system.

5. Post-Conditions

6. Extension Points

7. FAQ

<Company Name>

ECARS 2.0 - Driver Search Screen Action Specification

Revision History

Date	Version	Description	Author
05/31/2001	1.0	Created Document	Johnny S. Johnston
09/04/2001	1.1	Updated to reflect changes from Navigation use case.	James Atteberry
09/14/2001	1.2	Updated to include visual indication that renter is on do not rent list.	James Atteberry
10/08/2001	1.3	Replaced Renter Search screen shots with the versions that do not have print buttons.	Chris Carr

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Driver Search screen.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Driver Search

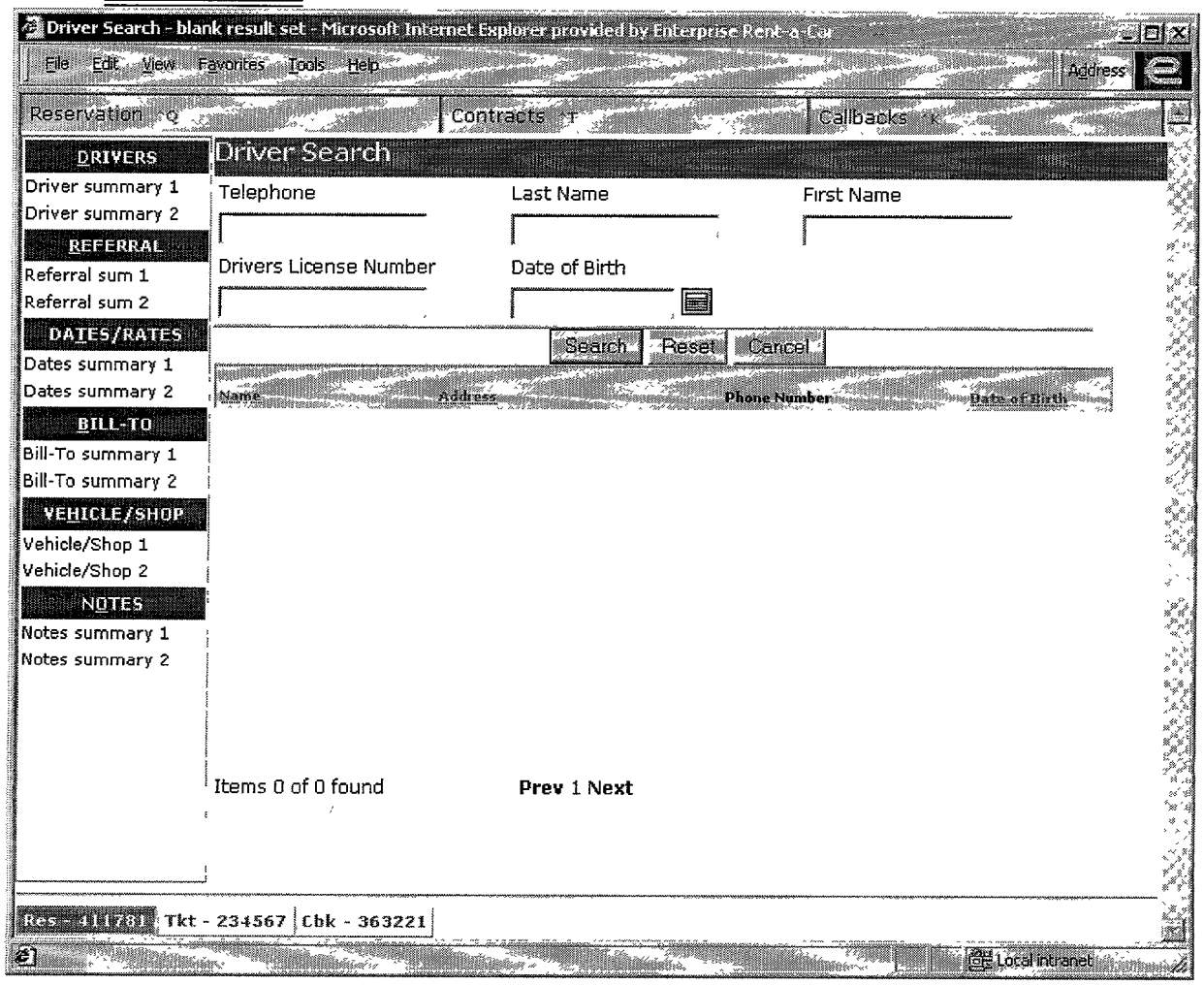

Figure 1 – Driver Search – No Display List

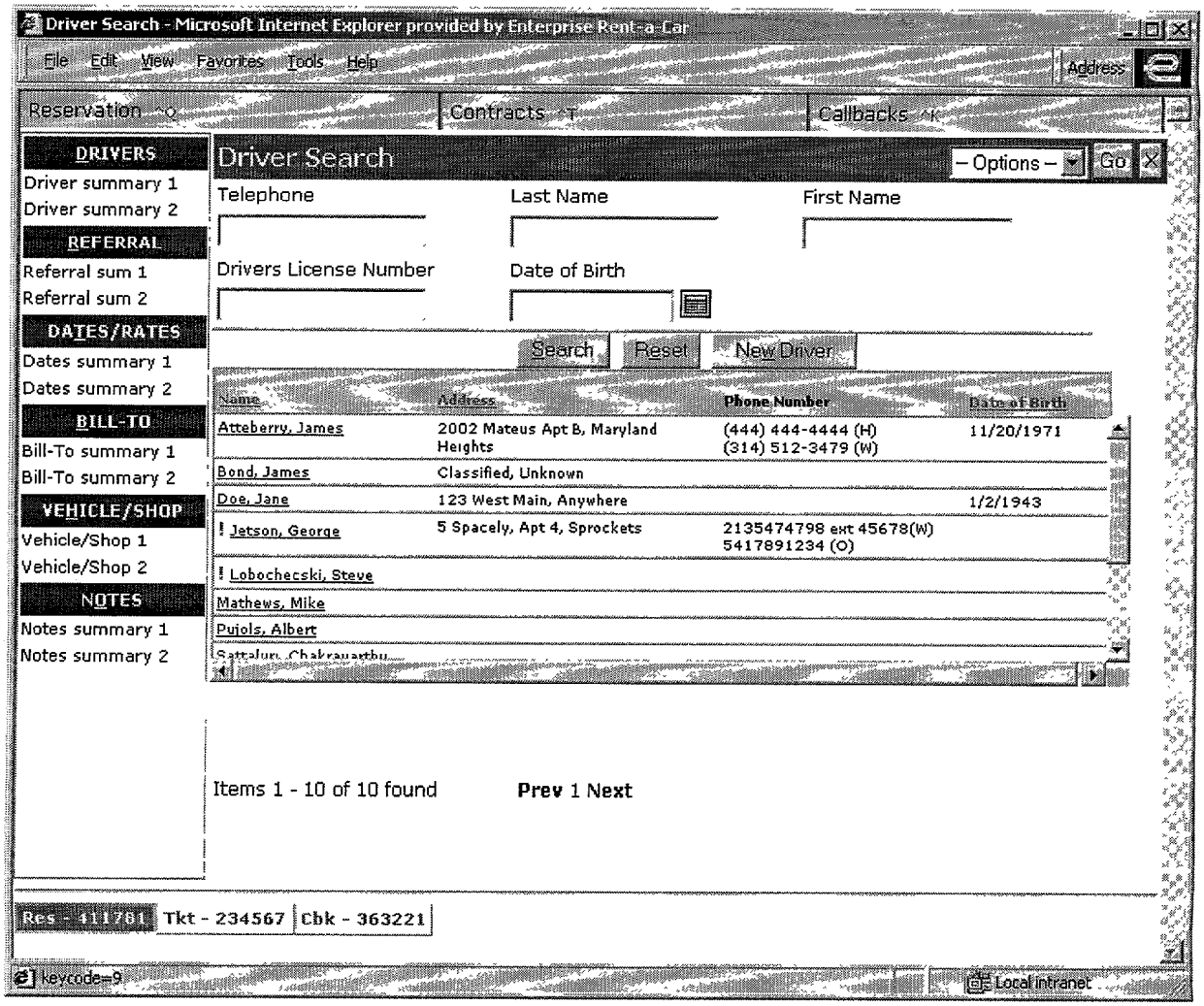

Figure 2 – Driver Search – Result Display List

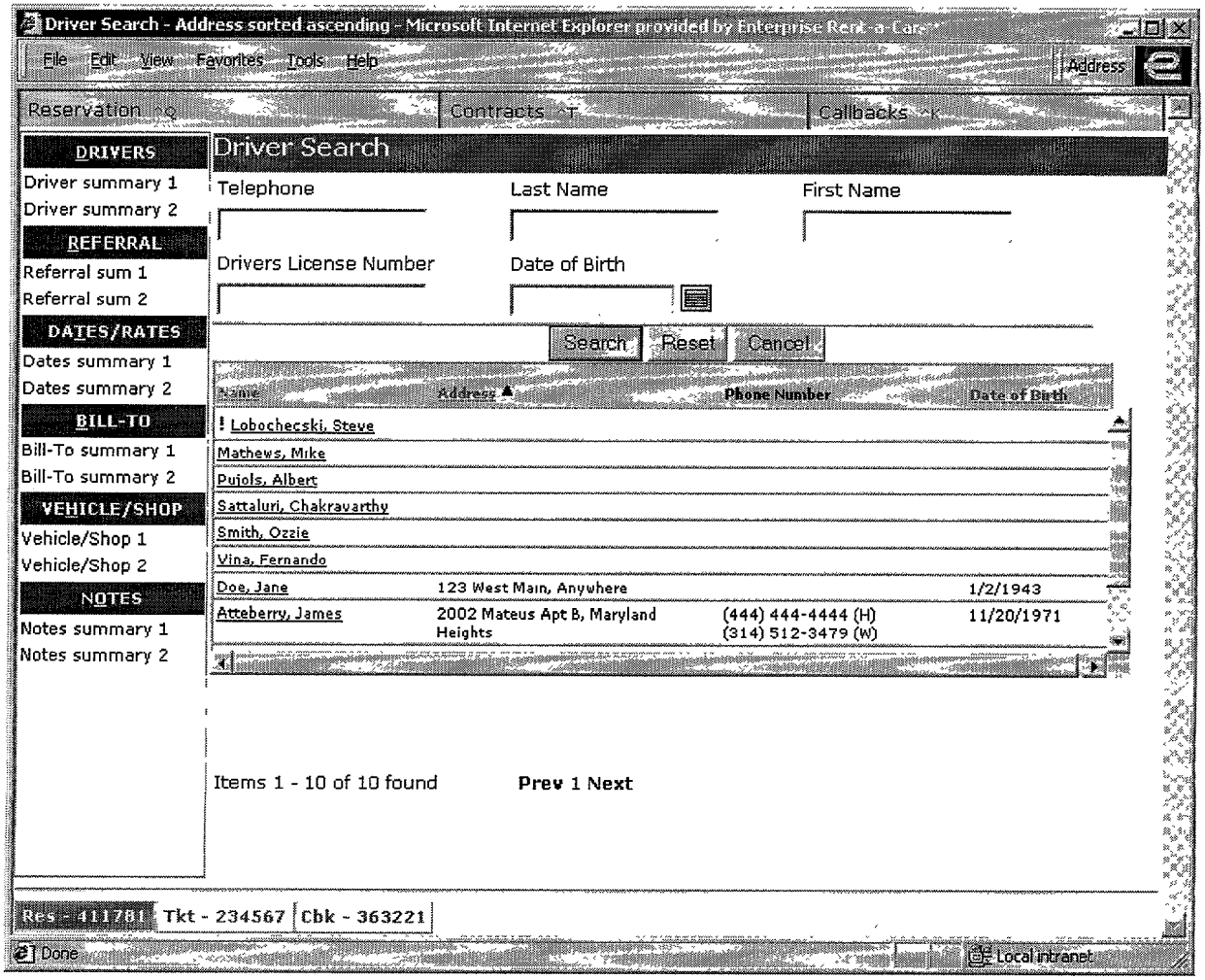

Figure 3 – Driver Search – Sort Ascending on Address Column

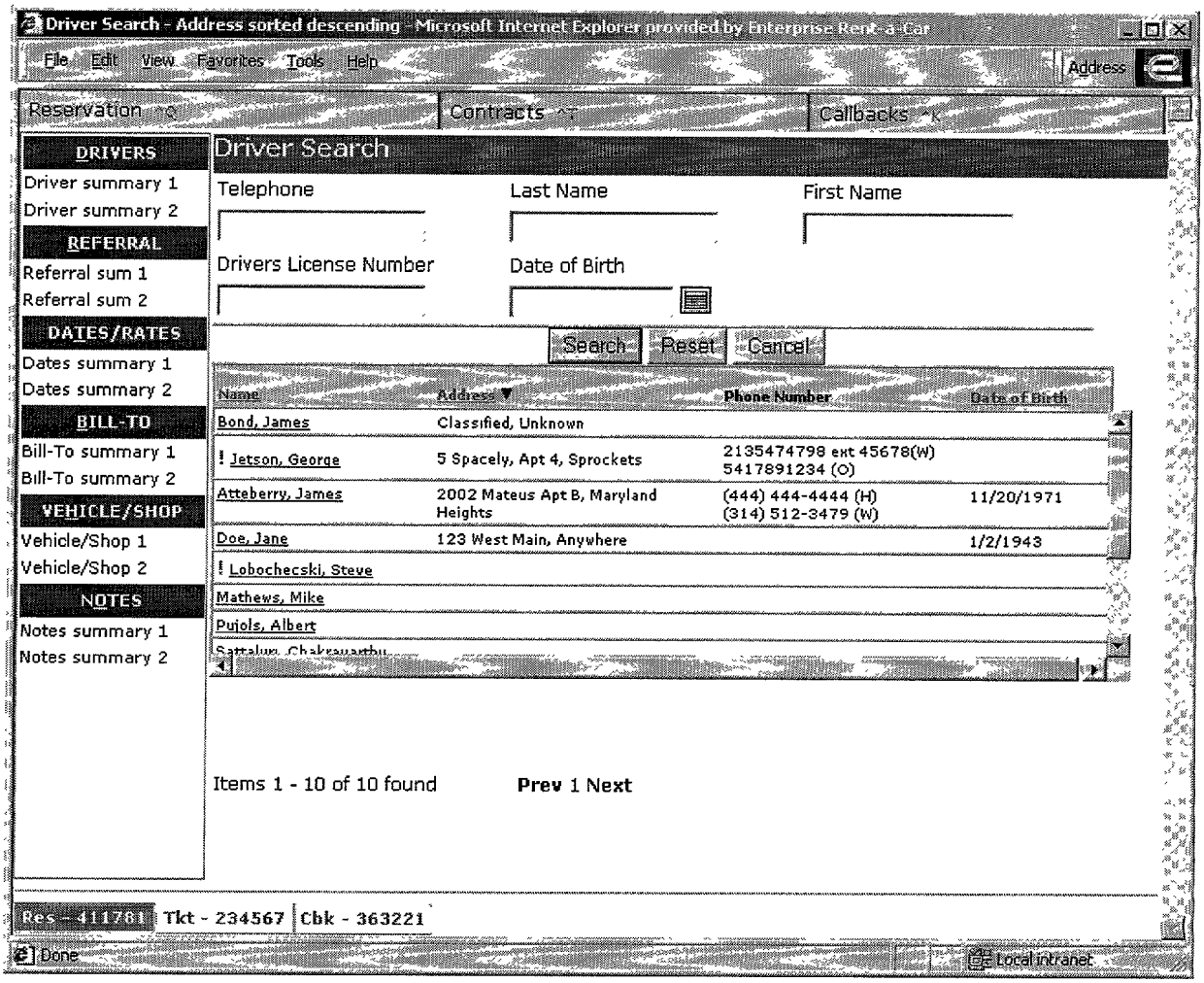

Figure 4 – Driver Search – Sort Descending on Address Column

3. Phone number

3.1 Behavior

This search criteria area will be an alphanumeric field. It will not be formatted for presentation purposes. Returns exact matches for the characters entered. A phone number is considered to be the entire number including area code. Example: In the United States, it would be the 3 digit area code, plus the seven digit phone number. (Country Code is not considered a part of the phone number.) The search will be on all phone number fields associated with the Driver/Renter. Currently, these are Home, Office and Other. If the same phone number is found in multiple areas for the same driver, the driver will only be displayed once, but all associated phone numbers will be listed.

The phone number is considered to be a stand alone search criteria and a search may be executed with just that single piece of information.

1. **Frequent Renter**
    1. User will have a single field to enter an area code and phone number.
    2. All special characters will be removed from the phone number criteria before the search begins.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

None identified at this time.

3.4 System Exceptions

None identified at this time.

4. Last Name / First Name

4.1 Behavior

This search criteria area will be a text field containing an implied wildcard after the entered criteria. The First Name field will not be enabled until search criteria has been entered into the Last Name field. Thus, the First Name field will not be accessible via either the tab key or the mouse unless Last Name data is present.
It will return exact matches for the characters entered and will continue with other text strings that match the characters entered, but are of a longer length (an implied wildcard). Example: If the **Last Name** search criteria entered were "Smith", you would receive back every open ticket with "Smith" in the Last name. You would also receive every character string that matched "Smith" for the first 5 characters, but was longer than five characters. Given this, you would also receive, "Smither", "Smithson", "Smithy", etc. These longer character matches would be alphabetically ascending after the exact character matches of equal length. The **First Name** field behaves in the same manner.

It should be noted that **Last Name and First Name** when used in combination, are stand alone search criteria and a search may be executed with these two pieces of information.

4.2 Validation

First name area is disabled until there is data the last name area.
Only having data in the last name area is not sufficient to execute a search.

4.3 Business Exceptions

If only the last name area has data, and a search command is executed, then a message will be presented. See the "error message" supplemental spec for exact text.

4.4 System Exceptions

None identified at this time.

5. Driver's License Number

5.1 Behavior

This search criteria area will be an alphanumeric field. It will not be formatted for presentation purposes. Returns exact matches for the characters entered.

The Driver's license number is considered to be a stand alone search criteria and a search may be executed with just that single piece of information.

5.2 Validation

None identified at this time.

5.3 Business Exceptions

None identified at this time.

5.4 System Exceptions

None identified at this time.

6. Date of Birth

6.1 Behavior

This search criteria area will be a numeric field. It will not be formatted for presentation purposes. The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match. There should be a calendar function available which would allow the user to select a date from a calendar icon, or similar feature, instead of entering a value. If the user selects a date from the calendar icons, it will be displayed in the date area formatted appropriately by the locale. (As determined for all locale specific formatting.)

6.2 Validation

It will be a valid month, day and year combination.
Only having data in the date of birth is not sufficient to execute a search.

6.3 Business Exceptions

If only the date of birth area has data, and a search command is executed, then a message will be presented . See the "error message" supplemental spec for exact text.

6.4 System Exceptions

If not a valid month, day and year combination, the normal date in error message should be displayed.

7. Results Display Area

7.1 Behavior

The result display will initially be blank on first presentation of the panel and until at least one search is executed and at least one record is found that matches the search criteria.

This display area provides the user with the search result list. The result list will be comprised of 4 static columns. The specific column order is:

1) The renter's last name and first name will be concatenated to form this column.
2) The renter's address.
3) Any and all phone numbers associated with the particular renter. Each phone number found will also display it's type, either Home, Work or Other.
4) The Renter's date of birth, formatted by locale.

The display presentation for each type of information will adhere to result list standards.
The default sort order is:

1) Renter last name and first name
2) Address.

The users would like to have the ability to sort the columns in both ascending and descending order. This will sort the entire result set. When a column is selected to sort, all other default or secondary sort criteria is abandoned. The manner in which Oracle sorts ascending and descending values will be used. The display

area will position to the top of the entire result list based on the column selected to sort. If the user moves forward or backward within the result list, the sort will still be in effect. (Note: The phone number column is not sortable.)

If the Renter is on the Do Not Rent list, a red exclamation point should be placed before the Renter Name.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Results Feedback Line Area

8.1 Behavior

This feedback area provides the user with the search result list count as well as list navigation. The user may select the block of records available as returned by the invoked search criteria. These blocks are identified by sequential numbers, along with a First (1st block of records) and Last (last block of records). Also appearing will the Previous and Next. When negotiating through the result list the sequential numbers will change depending upon the block of records being viewed, other blocks of records can be accessed via the Previous and Next hyperlinks. The Previous and Next, and appropriate blocks, should be enabled or disabled according to the positioning of the list. For example, if the list were displaying the first set of several sets of records, the Previous function would be disabled. Similarly, if the list were displaying the last set of records the Next function would be disabled.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

Buttons and navigation areas would be enabled and disabled appropriately for position of result list display.

9. Button Line Area

9.1 Behavior

The Search image/button will invoke the search process, submitting the form to the server.

The Reset image/button will clear out the all of the search criteria data areas.

The Cancel image/button will take the user to the last panel accessed.

9.2 Validation

None identified at this time.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

There is a restraint of which search criteria can stand alone and on which a search may be executed.

- Phone number may stand alone as one search criteria.
- Driver's license number may stand alone as one search criteria.
- Last name and first name in combination, may stand alone as one search criteria.
- Last name and Date of birth may not stand alone as a search criteria and must be used in conjunction with another search criteria.

If the appropriate amount of search criteria is not entered, then a message will be presented to the user stating "Additional search criteria required".

10. Rules

The Renter Name Last / First search criteria have an implied wild card character placed directly after the entered text, all other search criteria fields on this screen are to be treated as exact matches with searching.

There is a restraint of which search criteria can stand alone and on which a search may be executed.

- The phone number alone is may stand alone as one search criteria.
- Driver's license number is may stand alone as one search criteria.
- Last name and first name in combination, may stand alone as one search criteria.
- Last name and Date of birth many not stand alone and must be used in conjunction with another search criteria.

If not sufficient search criteria has been entered, then a message will be presented to the user stating "Additional search criteria required".

When there are not any matches to the input search criteria the user should be presented with a feedback message stating no items/records were found for the criteria entered.

If the search returns more reservations than can be displayed on the screen at one time, then the system needs to present to the user the range of records they are viewing out of the total number of records.

11. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

ECARS 2.0 Reservation
Use Case Specification: Discounts and Products Pilot

Version 1.3
Draft

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Revision History

Date	Version	Description	Author
6/15/01	1.0	First Draft	M. Pallia
6/21/01	1.1	Added SLP to products, added account as a discount type, and changed "entire rental" to "all days".	M. Pallia
6/25/01	1.2	Changed entire use case to reflect only the current functionality of ECARS 1.0	M. Pallia
6/27/01	1.3	Added a flow for population of DW and PAI for a rate source.	M. Pallia

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Use Case Specification: Discounts and Products Pilot

1. Discounts and Products Pilot

1.1 Brief Description

This use case describes the interactions between the user and the system when the user has decided to either manually select a discount, the user has selected a Rate Source that has a discount identified within the special instructions or the user wants to enter a rate for a product.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when the user has either selected a rate source within the Rates Use case, has decided to manually add a discount to a reservation or enter a per day rate for CDW or PAI/PEC. If the user has selected a Rate Source, the use case continues at alternate (Rate Source Discount). If the user has decided to manually enter a discount, the use case continues in the basic flow. If the user has decided to enter a per day rate for CDW or PAI/PEC, the use case continues at alternate (Add Products).

2.1.2 The system displays an area for the user to enter a discount percentage amount .

2.1.3 The user enters a percentage discount. (Example, if a user enters an 8, it will be considered 8%)

2.1.4 The system checks the amount entered . If the amount entered exceeds 50, the system displays a message to the user that a discount cannot exceed 50% .

2.1.5 The system retains the amount entered

2.1.6 The user can navigate to any other part of the reservation and the system initiates the Reservation Navigation Use Case. (Note: the user should have the ability to navigate at any time within this flow)

2.1.7 The use case ends

2.2 Alternative Flows

2.2.1 Rate Source

2.2.1.1 From the basic flow, the user has selected a rate source that has a discount, DW or PAI/PEC identified within the special instructions . If the rate source does not have a discount, DW or PAI/PEC identified, the use case continues at (2.1.1) within the basic flow. If the rate source does have DW, PAI/PEC or both identified, the use case continues at alternate (Rate Source Products).

2.2.1.2 The system populates the discount determined into the percentage discount area and gives the user the option to change or remove this discount . If the user chooses to change or remove the discount, the use case continues at (2.1.2) within the basic flow.

2.2.1.3 The user can navigate to any other part of the reservation and the system initiates the Reservation Navigation Use Case . (Note: the user should have the ability to navigate at any time within this flow)

2.2.2 Rate Source Products

2.2.2.1 From the alternate (Rate Source), the system populates the amounts for DW, PAI/PEC or both

determined by Special Instructions into the DW or PAI/PEC area and provide the user the option to change or remove the products . If the user chooses to change or remove the products, the use case continues at (2.2.3) within the basic flow.

2.2.2.2 The user can navigate to any other part of the reservation and the system initiates the Reservation Navigation Use Case . (Note: the user should have the ability to navigate at any time within this flow)

2.2.3 Add Products

2.2.3.1 From the basic flow, the user has decided to enter a rate for a product.

2.2.3.2 The system displays an area where the user can enter a per day rate for DW or PAI/PEC .

2.2.3.3 The user enters rates for DW or PAI/PEC . (Note: The user can enter either of these within a reservation).

2.2.3.4 From here, the user can navigate to any other part of the reservation and the system initiates the Reservation Navigation Use Case .

2.2.3.5 The use case ends

3. Special Requirements

- In Germany, it is against the law to show that a discount was applied to a rate and to print the discount.

4. Future Scope

5. Pre-Conditions

The user must have initiated the Create Reservation use case.

6. System Generated Notes – Products and Discounts

6.1 Notes should be generated when the following events occur :

Event	Note Text	When to generate
The user changes any of the values within the products area .	What values were changed and what the old and new values are.	Create (If the products are auto-populated) /Edit

7. Post-Conditions

8. Extension Points

9. Questions

ECARS 2.0 Reservation
Use Case Specification: Reservation with Dates

Version 1.2
Draft

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Revision History

Date	Version	Description	Author
06/11/2001	1.0	Initial Draft	J. Gaines
6/25/01	1.1	Updates to Use Case	M. Pallia
6/27/01	1.2	The changes made are: • The dependencies between options were removed. • Pick-up location is a free form text area • Start charges by typing in a day was changed to 1 character entry only • Airport Information Scoped for pilot • System Generated directions scoped for pilot • For pick-up time, the user must be able to also see how many reservations are booked during each half hour for the selected pick-up date. • Mileage is coined –no charge for mileage or limited free mileage. • Start charges if different now includes a date and TIME. Not just a date.	M. Pallia
10/12/2001	1.3	Removed all references to start/end charges date	James Atteberry

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Use Case Specification: Reservation with Dates

1. Reservation with Dates

1.1 Brief Description

This use case describes the interactions a user makes with the system to determine what day and time, where, and how a customer will be come into Enterprise.

2. Flow of Events

2.1 Basic Flow

2.1.1 The system displays an area with the following options :

Sorted from most commonly entered options to least commonly entered.

- Enter a Pick Up Date and Time . If the user chooses this option, the use case continues in the basic flow
- Select a Pick up Method . If a pick up method is selected, the use case continues at alternative flow (Pick Up Method)
- Pick-up location . If the user chooses to identify a pick-up location, the use case continues at alternate (Pick-up Location).
- Take Directions . If take directions is selected, the use case continues at alternate (Directions).
- Change P/U or Return Location . If the user elects to change pick up or return location, the use case initiates the Change P/U or Return Location use case.
- Enter Package Specials . The use case continues at alternative flow (Package Specials).
- Airport Information . If the user chooses this option, the use case continues at alternate (Airport Info).
- Enter a Return Date and Time . If a Return date is entered, the use case continues at alternative flow (Add Return Date and Time)
- Enter a Drop Charge If a Drop Charge is entered, the use case continues at alternate (Add a Drop Fee)

2.1.2 The system provides the following options to the user for selecting pick up date and time :

- Manually entering the date and time .
- Using a calendar function to select a date . The use case continues at alternative flow (calendar function)
- Selecting a time from a list of 30-minute time increments . The use case continues at alternative flow (Pick-up time - 30-minute increments)

2.1.3 The system checks the date entered . If the date entered is less than the current date or more than 13 months in the future , the use case continues at alternative flow (Invalid Pick Up Date). If the date entered is not a valid date (i.e. February 30) the use case continues at alternative flow (Invalid Date). If the Pick Up date is a day that the branch is closed , the use case continues at alternative flow (Branch Hours). If the Pick-up date is prior to the current date , the use case continues at alternate (Invalid Date).

2.1.4 The system checks the time entered . If the time is invalid , the use case continues at alternative flow (Invalid Time). If the time is outside of the branch's operating hours , the use case continues at alternative flow (Branch Hours). NOTE- the user will not be allowed to enter a time until a date has been entered.

2.1.5 The user has the following options

- Choose another option from 2.1.1 of the basic flow.

- Complete Reservation
- Save and Continue . If the user chooses to Save and Continue, the use case continues at alternative flow (Save and Continue)
- Navigate to any other area within reservation . The system initiates the Reservation Navigation Use Case.

(Note: User has the option to save to the database and continue from place saved anytime after (2.1.2) of the basic flow.)

2.1.6 The use case ends.

2.2 Alternative Flows

2.2.1 Invalid Pick Up Date

2.2.1.1 The system displays a feedback message that the Date is invalid .

2.2.1.2 The system prompts the user to correct the values that are invalid .

2.2.1.3 The user enters the correct values and the use case continues at (2.1.3) of the basic flow.

2.2.2 Invalid Return Date

2.2.2.1 The system displays a feedback message that the Date is invalid .

2.2.2.2 The system prompts the user to correct the values that are invalid .

2.2.2.3 The user enters the correct values and the use case continues at (2.2.7) of the alternate flow (Return Date and Time).

2.2.3 Invalid Date

2.2.3.1 The system displays a feedback message that the Date is invalid .

2.2.3.2 The system prompts the user to correct the values that are invalid .

2.2.3.3 The user enters the correct values and the use case continues at (2.1.3) of the basic flow.

2.2.4 Invalid Time

2.2.4.1 The system displays a feedback message that the Time is invalid .

2.2.4.2 The system prompts the user to correct the values that are invalid .

2.2.5 Branch Hours

2.2.5.1 The system displays a feedback message that the branch is closed.

2.2.5.2 The user is given the option to select a different time or the user can continue.

2.2.5.3 If the user chooses to continue, the system will accept the values and the use case continues at (2.1.1) of the basic flow. If the user chooses to select another time, the use case will continue at (2.1.4) of the basic flow.

2.2.6 Add Return Date and Time

2.2.6.1 From the basic flow, the user decided to enter a Return Date and time .

2.2.6.2 The system provides the following options to the user for selecting return date and time:

- Manually entering the date and time.
- Using a calendar function to select a date. The use case continues at alternative flow (calendar function)
- Selecting a time from a list of 15-minute time increments. The use case continues at alternative flow (15-minute increments)

2.2.6.3 The system checks date entered. If the date entered is less than the current date or more than 13 months in the future, the use case continues at alternative flow (Invalid Return Date). If the date entered is not a valid date (i.e. February 30) the use case continues at alternative flow (Invalid Date). If the Pick Up date is a day that the branch is closed, the use case continues at alternative flow (Branch Hours).

2.2.6.4 The system checks the time entered. If the time is invalid, the use case continues at alternative flow (Invalid Time). If the time is outside of the branch's operating hours, the use case continues at alternative flow (Branch Hours). If a time is entered but no date is entered, the use case continues at alternative flow (Time with No Date)

2.2.6.5 The use case continues at (2.1.5) within the basic flow

2.2.7 Calendar Function

2.2.7.1 From the basic flow or Return Date alternate, the system will display a calendar control to the user according the HTML standard already implemented.

2.2.7.2 The user selects the date

2.2.7.3 The system populates the date and the use case continues at the exact spot from which they came.

2.2.8 Pick-up Time - 30-Minute Increments

2.2.8.1 From the basic flow, the user chooses to select a 30-minute interval from a list.

2.2.8.2 The system displays a table to the user that has the following information:

- A list of times in 30-minutes intervals for one 24-hour period cued up to the first half hour interval of the physical location's operating hours for the chosen pick-up date. For example, if the branch opens at 7:30 am on the date that is selected, the list should cue up to the 7:30 interval. On the other hand, if the branch opens at 7:15am, the list should cue up to 7:00 am. (NOTE: The user must be able to select any 30-minute interval within one 24-hour period).

And

- The total number of reservations for each 30-minute interval during the date selected as the pick-up date. The reservation count does not include voided reservations.

(NOTE: the system must differentiate the time intervals that are not within the operating business hours of the terminal's physical location)

2.2.8.3 The user selects a 30-minute interval from the list . If the date the user selects is a day the branch is closed or if the branch has no hours of operation defined, the system will cue up to 7:00am . If the interval is outside of the branch's operating hours, the use case continues at alternate (Branch Hours). If the Pick-up date and Return date are the same and the return time is prior to the pick-up time, the use case continues at alternate (Invalid time)

2.2.8.4 The use case continues at (2.1.5) within the basic flow.

2.2.9 15-Minute Increments

2.2.9.1 From the Alternate (Return Date and Time) and alternate (Package Specials), the user chooses to select a 15-minute interval from a list.

2.2.9.2 A list of times in 15-minutes intervals for one 24-hour period cued up to the first half hour interval of the physical location's operating hours for the chosen pick-up date. For example, if the branch opens at 7:30 am on the date that is selected, the list should cue up to the 7:30 interval. On the other hand, if the branch opens at 7:15am, the list should cue up to 7:00 am. If the branch is closed or there are no hours listed for a particular location, the list should cue up to 7:00am (NOTE: The user must be able to select any 15-minute interval within one 24-hour period).

(NOTE: the system must differentiate the time intervals that are not within the operating business hours of the terminal's physical location)

2.2.9.3 The user selects a 15-minute interval from the list. If the interval is outside of the branch's operating hours, the use case continues at alternate (Branch Hours). If the Pick-up date and Return date are the same and the return time is prior to the pick-up time, the use case continues at alternate (Invalid time)

2.2.9.4 The use case continues at (2.1.5) within the basic flow.

2.3 Drop Fee

2.3.1 The user selects to add a drop fee for the return location of a reservation.

2.3.2 The system will allow the user to enter a drop fee.

2.3.3 The user enters the drop fee and the use case continues at ( ) in the basic flow.

2.3.4 Package Specials

2.3.4.1 From the basic flow, the user chooses to add a special rate package.

(NOTE - If the user wants to add a Package special, the user must first select a billing type)

2.3.4.2 The system displays an area for the user to enter the following:

- Start date
- Start time
- End date
- End time
- Package Amount or Per Day amount
- Free Miles or Miles per day
- Additional Mileage Fee

2.3.4.3 The user enters a start date, start time, end date and end time manually in to the area provided. If the user chooses the calendar function to enter a date, the use case continues at alternate (calendar function). If the user selects a time from the 30-minute intervals provided, the use case continues at alternate (30 minute increments)

2.3.4.4 The system checks the dates and times entered by the user. If any of the following occur, the use case continues at either alternate (invalid date), alternate (invalid time) or alternate (Time no Date):

- A time and no date is chosen
- A start date prior to the current day

- A start date prior to the Pick-up date
- An end date after the return date
- An end date prior to the pick-up or start date
- If the start date and the end date are the same date.

If the user picks a date or time outside of the branch's operating hours, the use case continues at alternate (Branch Hours)

2.3.4.5 The system provides the user with the following option:

- Enter a package amount or a per day amount

2.3.4.6 The User enters an amount for the package in the area provided. If the user chooses to enter a per day amount, the use case continues at alternate (Per Day Special)

2.3.4.7 The system provides an area to determine the amount of miles allowed for the package and gives the user the option to choose No Charge for Miles or specify a limited amount of free miles.

2.3.4.8 The user selects No Charge for Miles. If the users chooses to specify limited free mileage, the use case continues at alternate (Limited Mileage Package)

2.3.4.9 The use case continues at (2.1.5) within the main flow.

2.3.5 Per Day Special

2.3.5.1 From the alternate (Package Special), the system displays an area for the user to enter a per day rate and chose either No Charge for Miles or limited free miles.

2.3.5.2 The user types in a per day rate and chooses No Charge for Miles for the mileage. If the user chooses limited free miles, the use case continues at alternate (limited mileage per day special).

2.3.5.3 The system validates the rate and the mileage choice. The system retains the entered information and the use case continues at (2.1.5) within the basic flow.

2.3.6 Limited Mileage Package

2.3.6.1 From the alternate Package Specials, the system provides an area for the user to enter the following information:

- Mileage per package
- Amount for over mileage

2.3.6.2 The system validates the mileage entered and the dollar amount entered. The system retains the data entered and the use case continues at (2.15) within the basic flow.

2.3.7 Limited Mileage Per Day Special

2.3.7.1 From the alternate (Per Day Special), the system provides an area for the user to enter the following information:

- Mileage per day during the special
- Amount for over mileage

2.3.7.2 The system validates the mileage entered and the dollar amount entered. The system retains the data entered and the use case continues at (2.15) within the basic flow.

2.3.8 Pick Up Method

2.3.8.1 From the basic flow, the system displays an area for the user to select a pick-up method. The values available to the user are:

- W/In
- P/Up
- Del
- CWC
- Del/R

2.3.8.2 The user selects walk-in as the pick-up method. If the user selects P/Up, Del, CWC or Del/R, the use case continues at alternate (Pick-up Location), otherwise, the use case continues at (2.1.5) within the basic flow.

2.3.9 Pick Up Location

2.3.9.1 From the alternate (Pick-up Method), the system provides an area for the user to manually enter a pick-up location in a free form text field.

2.3.9.2 The user enters a location

2.3.9.3 The system retains the information that was entered and provides the user the following options:

- Enter Directions – If the user chooses this option, the use case continues at alternate (Directions).
- Select another option. The use case continues at (2.1.5) within the basic flow.

2.3.10 Airport Information

2.3.10.1 From the basic flow, the system displays the following fields to be entered by the user when the Pick up location selected is Airport:

- Airline Name
- Flight Number
- Arrival Time

2.3.10.2 The user enters the information and the use case continues at (2.1.5) of the basic flow.

2.3.11 Directions

2.3.11.1 From alternative flow (Pick up location) or the basic flow, the system will provide an area to either enter directions or, if a pick-up location has been chosen, the system will determine the directions. If the user chooses system-generated directions, the use case continues at alternate (system-generated directions).

2.3.11.2 The user types in the directions in a free text area.

2.3.11.3 The system retains the directions.

2.3.11.4 The use case continues at (2.1.5) within the basic flow.

2.3.12 System generated directions (Future scope)

2.3.12.1 The system checks the pick up location and determines if there is enough information to generate directions.

2.3.12.2 The system generates the driving directions from the physical terminal's location to the pick-up location selected by the user.

2.3.12.3 The system displays the directions to the user and the use case continues at (2.1.5) within the basic flow.

2.3.13 Cancel

2.3.13.1 Get from HTML standards document**********

2.3.14 Complete Reservation

2.3.14.1 Get from HTML standards document**********

2.3.15 Save and Continue

2.3.15.1 Get from HTML standards document**********

3. Special Requirements – Reservation Dates

- The user may key in a pick up time or select a pick up time from a list of time periods in 30-minute intervals, within branch operating hours. A time may not be selected without a valid date.
- User must be able to navigate to any other panels within the application.
- The user may only determine one discount per reservation

4. Pre-Conditions

- The system must have successfully initiated the Create Reservation Use Case.

5. Post-Conditions

6. System Generated Notes – Dates

6.1 Notes should be generated when the following events take place :

Event	Note Text	When to generate
The Reservation Pick-up date is changed	Pick-up Date "XX/XX/XXXX" was changed to "XX/XX/XXXX"	Edit
The Reservation Pick-up time is changed	Pick-up Time "XX: XX" was changed to "XX: XX"	Edit
The Reservation pick-up method is changed	Pick-up Method "XX" was changed to "XX".	Edit
The Reservation pick-up location is changed	Pick-up Location "XXXX" was changed to "XXXXX"	Edit
The Reservation Return date is changed	Return Date "XX/XX/XXXX" was changed to "XX/XX/XXXX"	Edit
The Reservation Return time is changed	Return Time "XX: XX" was changed to "XX: XX"	Edit
The Reservation return method is changed	Return Method "XX" was changed to "XX".	Edit

7. Extension Points

8. Future Scope

9. Q's

1. When coming in from create reservation, if no pick up date has been entered and no date is entered in the dates section, will the system default to the current date or leave the pick up date blank?
2. Does the user have to select a method, location and directions or can the user enter any of the following independently?

Enterprise Rent A Car

ECARS 2.0 Reservation
Use Case Specification: Daily Reservation Summary

Version 1.1

Revision History

Date	Version	Description	Author
<04/27/01>	<1.0>	<First Draft of Pick up Summary after it was separated out of the Daily activity use case>	<J. Gaines>

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Use Case Specification: Daily Reservation Summary

1. Daily Reservation Summary

1.1 Brief Description

The pickup summary screen is a summary view of the day's reservations for a particular branch. The user will be able to see at a glance the number of reservations the branch has during 30 minute time period, how many of each pick up method for those reservations and how many of each car class for the reservations in the summary.

2. Flow of Events

2.1 Basic Flow

2.1.1 This use case is initiated when the user elects to view the Pick Up Summary panel.

2.1.2 The system establishes current date and time for the terminal's physical location.

2.1.3 The system establishes current group and branch for the terminal's physical location.

2.1.4 The system retrieves all daily reservations that match the default group/branch for the date and time equal to the branch's current local date and time . If the system retrieves no reservations, the use case continues at alternate flow (No Records).

2.1.5 The system displays the Pick Up Summary table. The system displays to the user the results according to the following headers and sort order for the default group and branch.

The system displays a summary table to the user with the following column headers:

- Time (presented in 30 minute increments)
- Pick Up method (Delivery/Pick Up/ Walk-In)
- Car Class

2.1.6 The system displays the Pick Up Summary table in the following sort order:

- Time (ascending) In 30-minute increments.
- No pick up time entered shown at the top of the list.
- No pick up date entered shown at the bottom of the list.

2.1.7 The information in the summary will be presented to the user so the user can obtain the following information at a glance:

- The Pick Up Summary will show at a glance, how many reservations there are in each half hour time period.
- From the Pick Up Summary, how many of each car class is scheduled to go out per half hour time period. (**Note**: car classes shown are only the ones found on the reservations retrieved. The only car classes displayed are the ones retrieved from reservations. Car classes not retrieved by the system are not displayed.)
- From this summary the user will be able to see how many of each identified pick up method is scheduled for a time period.
- From this summary, the user will be able to distinguish newly created reservations* from existing reservations.

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2.1.8 The system will display reservations so all reservations with a pick up time equal to the current date are displayed without scrolling.

The user will be able to see all reservation summaries without scrolling up and down or side to side, including all reservations with that have a pick up date equal to the current date but no pick up time entered on the reservation.

*A new reservation is one that:

- Natres reservations that are sent during the current day.
- ARMS reservations sent during the current day.
- Branch reservations that are created during the current for the current day.
- Reservations that are transferred from another branch for the current day.
- Reservations that are moved from another day to the current day within the same branch.
- Reservation for the current day that's time has been changed during the current day.
- Reservation that has a creation date equal to the current date.

2.1.9 The user can perform the following options:

- The user chooses to view the list form of the reservations for a particular time, the use case continues at alternate flow (View Reservation List for a Selected Time)
- The user chooses to refresh the list, the use case continues at alternate flow (Refresh)/
- The user can change location. The use case continues at alternate (Change Location)

2.1.10 The use case ends.

2.2 Alternative Flows

2.2.1 No Records

2.2.1.1 The system displays a zero results list display and the use case continues.

2.2.2 View Reservation List for a Selected Time

2.2.2.1 The user chooses to view the expanded list form for a reservation or group of reservations in a chosen time block.

2.2.2.2 The user clicks on the time he wishes to view reservations for in the Pick Up summary.

2.2.2.3 The system checks the time selected and retrieves the default group/branch reservations that have a pickup time equal to the time selected.

2.2.2.4 This use case includes the Daily Activity use case with the selected starting time.

2.2.3 Refresh

2.2.3.1 The system can be manually refreshed by the user and checks the branch's current local date and time then retrieves and displays any new reservations* that have a creation date equal to the branch's current local date. These new reservations will display in a manner that make them distinguishable from the other reservations already in the list.

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2.2.4 Change Location

2.2.4.1 From the main flow, the user can change location. They can change either the group and branch or just the branch within the same group. For Reservation pilot, the user will be able to only change the Branch.

2.2.5 The user selects the branch drop down list from the summary screen .

2.2.6 The system will display the rental branches for the group, defaulting to the current location .

2.2.7 The user selects a branch from the drop down list.

2.2.8 The system will display a view of the selected branch's summary data and the use case continues at (2.1.4) in the basic flow using the entered branch as the current branch.

2.2.9 Change Date

2.2.9.1 From the main flow, the user changes the start date of the summary list . Once the user selects a new date, the use case continues at (2.1.4) in the basic flow using the entered date as the default date.

3. Special Requirements –Reservation Summary UC

1. The user can click on a time in the Pick Up Summary and "hyperlink" to the expanded Daily Reservation list for the time selected .

2. As in Search Reservation use case, Column Headers are sortable.

3. Types of reservations not shown in the default group/branch daily reservation list are as follows:
   - Voided reservations.
   - Reservations transferred to another branch.
   - Reservations that have been attached to an open ticket .

4. The total number of reservations for the day should be displayed in the Pick Up Summary .

5. Refresh will be manual refresh. Business does not want refresh to interrupt work in an application. Should not refresh while scrolling through a reservation list. Should not refresh so as to be noticeable by the user while working in an application

6. Refresh will also occur automatically when the user leaves the Daily reservation list then returns to the list .

7. A newly created reservation is any reservation with a creation date equal to the local current date .

4. Pre-Conditions

- The user has successfully logged onto the system.

5. Post-Conditions

6. Extension Points

7. Important Questions for Jon and Mary

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<Company Name>

ECARS 2.0 - Reservation Notification
Screen Action Specification

Revision History

Date	Version	Description	Author
04/24/2001	1.0	Created Document	Johnny S. Johnston
05/04/2001	1.1	Updated and included screen shots	Johnny S. Johnston
09/04/2001	1.2	Updated to reflect changes from Navigation use case.	James Atteberry
10/10/2001	1.3	Updated screen shot to reflect current image.	James Atteberry

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Reservation NotificationScreen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the ARMS Notification, and its related screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. ARMS Notification – Most Critical and Less Critical

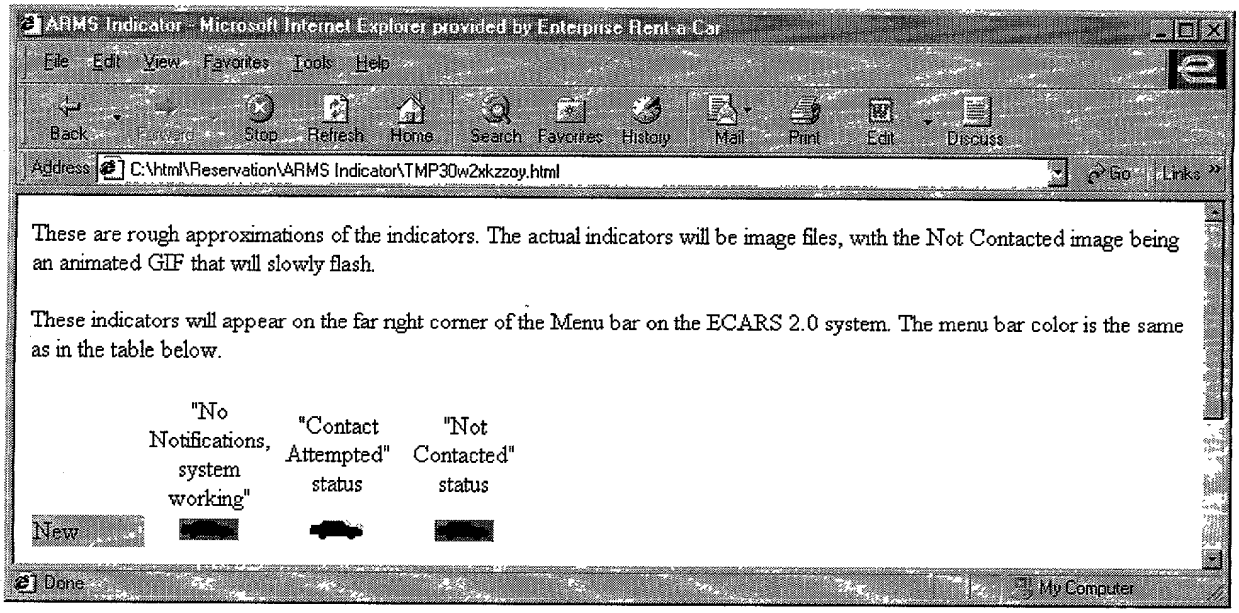

Figure 1 – Most Critical and Less Critical

3. ARMS Notification – Result Display List

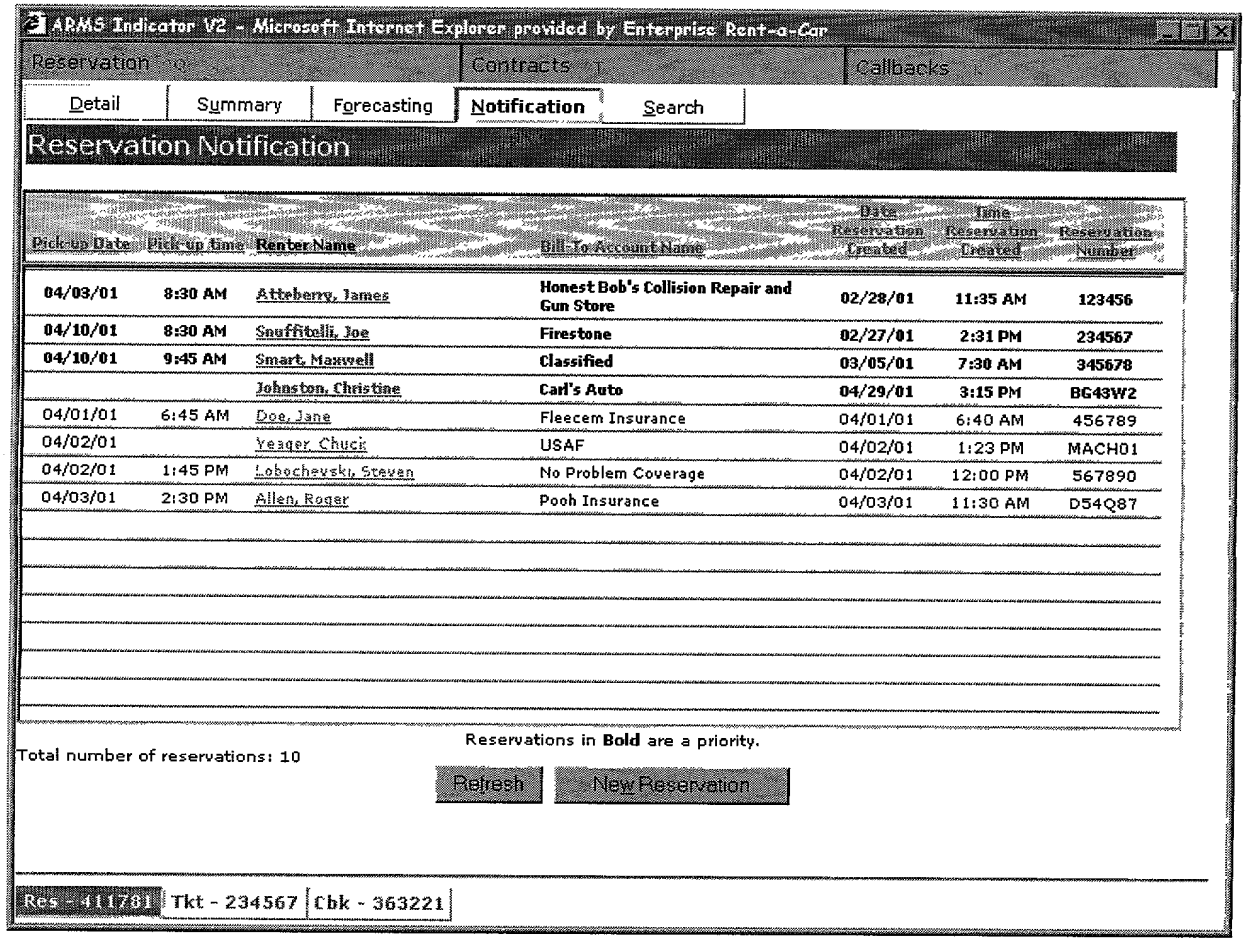

Figure 2 – Result List Display

4. Initial Notification

4.1 Behavior

Once a user has signed onto the ECARS 2.0 Rental Application, there must be something that is operating that is able to recognize and trigger a notification to the user that a particular type of reservation has been added to the Oracle database.

- For all North American rental locations and call center locations, the notification is displayed when a reservation is added to the Oracle database that has an ARMS origin and the Pick-up Group/Branch equals the physical terminal's Group/Branch.
- For European terminals, whenever a reservation's pick-up location has changed from Group/Branch UK9Z to any other valid Group/Branch Number. Once the pick-up group/branch

number change is committed to the database, the notification will display to the new Group/Branch location. (Not UK9Z).

- For Pilot Reservation ONLY, no notification image will be present on non-North American screens.

The notification indicators will appear on the far right corner of the Menu bar on the ECARS 2.0 system . The notification should be displayed on each terminal that is associated to the Physical location's Group/Branch Number

The notifications will look like this (see diagram): 1) The "Not Contacted" notification will be a rectangle with a red border and a black car. The image will blink by changing the background color and the car color. . 2) The "Contact Attempted" notification will be identical in size to the "Not Contacted" notification, but the background color is yellow. . 3) The "Contacted" notification will be identical in size to the others, but the background is green. .

Note: The intent is to design a scalable notification method/system that can be expanded in the future which would allow notification(s) to be displayed to the user based on different elements or pieces of information contained on a reservation or contract.

4.2 Validation

The system needs to determine which terminal is associated with a specific group, and branch (based on physical location) so it will be able to route the notification to the proper terminal(s) based on the reservation's pick-up branch location . (Example: the system will have to know all terminals located at the Hazelwood branch in north St. Louis county in order to send the appropriate notification to those terminals when an ARMS reservation is made, with a contact status of Not Contacted, with the pick-up branch being that Hazelwood branch).
It will also have to determine if the branch is located in North America or Europe, (Again, probably expended to be by country, or other geographical locations, in the future). This is currently needed as North America will key off the Branch origin of ARMS, for their notifications, and the UK will key off of a specific branch number UK9Z. It is possible that this could be multiple branches (or what-ever is the notification key) in the future, so this feature needs to be expandable.

For the immediate design, there will be a "contact status" associated with the ARMS reservations. The valid domain for contact status is:

- Not Contacted
- Contact Attempted
- Contacted

It is the value of the contact status, which determines the magnitude of criticality or degree of annoyance of the notification.

A value of "Not Contacted" should display the notification with the greatest magnitude of criticality or greatest degree of annoyance.

A value of "Contact Attempted" should display the notification with a lesser magnitude of criticality or lesser degree of annoyance.

A value of "Contacted" should display the notification with no magnitude of criticality or annoyance.

The user may elect to acknowledge the notification or not acknowledge the notification.

If the user does not acknowledge the notification, it always remains visible to the user, in the persistent state, but no further action is required .

If the user acknowledges the notification the, system displays a list of all of the reservations, which prompted the notification. In North America this will be ARMS reservations, in Europe this will be those reservations with a branch origin of UK9Z. See the Results Display Area, below, for behavior after the user acknowledges the notification.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

The system would provide an error message of "Reservation notification system not available" if the notification system is down or not available for use . The error messages will be tailored and applicable to what the notification applies in other countries and locales.

5. Results Display Area

5.1 Behavior

The user has acknowledged the notification. As such, the system displays a list of all of the reservations, which prompted the notification. In North America this will be ARMS reservations, in the UK this will be those reservations with a branch origin of UK9Z.

For Pilot Reservation ONLY, this screen will not be available to non-North American users.

The reservation information displayed will be:

1. Pick-up Date
2. Pick-up Time
3. Renter Name – Concatenated Last Name, First Name
4. Bill-To Account Name
5. Reservation Creation Date
6. Reservation Creation Time
7. Reservation Number

All appropriately formatted by locale. The display presentation for each type of information will adhere to result list standards.

The information will be initially sorted and displayed by:

Contact Status – All of those with a status of Not Contacted will appear before those with a status of Contact Attempted.
The Not Contacted status reservation information should be in a bolder, or larger font, than the Contact Attempted status reservation information. (Or any other method that would make the Not Contacted status of reservations immediately obvious from the reservations with a status of Contact Attempted.)

Within each contact status, the information will be sorted and displayed by:

1. Pick-up Date – In numerical ascending order.
2. Pick-up Time – In numerical ascending order.

For date and time sorting the following will be the standard:

1. Reservations with a date, but no time.
2. Reservations with a date and a time.

3. Reservation with no date, but have a time.
4. Reservations with no date and not time.

3. Renter's Name – In alphabetical ascending order.

All appropriately formatted by locale. The display presentation for each type of information will adhere to result list standards.

Once the results list has been populated with one or more reservations, the user should:

1. Have the ability to sort any of the columns displayed in both ascending and descending order. This will only sort the entire result set . It will sort ascending or descending on the column selected with out any implied or defaulted secondary sort criteria. If the user moves forward or backward within the result list the sort will continue as the entire result list has been sorted.

2. Have the capability to indicate or select an individual reservation from the result list, and perform a simple task, (a function button, icon, mouse click) which would then open the reservation for editing purposes. Within this display list the user would select a link from the Renter Name column to edit the reservation . This would be contingent upon the user having the appropriate security to edit the reservation selected. This functionality will be consistent and standard throughout the application.

For all additional behavior associated with the result display list, refer to the Edit a Reservation Use Case and Behavior Document.

5.2 Validation

None identified at this time

5.3 Business Exceptions

None identified at this time

5.4 System Exceptions

None identified at this time.

6. Button Line Area

6.1 Behavior

The Refresh button will reload the data and display according to the default rules.

The New Reservation button will create a new reservation, changing the screen to that reservation.

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. Subsequent ARMS Notification System Behavior

(This will be defined in greater detail within the Edit/View Behavior Documents)
Behavior to consider after a user edits a reservation.

It is envisioned that once a user selects a reservation for editing, before they will be able to save or exit the reservation, they must respond to some sort of dialog box, which will pose some question in the form of:

1. Has the renter has been contacted? With a Yes, No check box or option area.
2. Has an attempt been made to contact the renter? With a Yes, No check box or option area.

Based on the results or answers to the questions, the values in the particular reservation's contact status may be changed which will require the notification process to monitor and reflect these changes, and adjust the magnitude of annoyance of the notification according, if needed, as described previously.

The exact behavior and what responses drive the changing of what values of the contact status, will be described as part of the Edit A Reservation development process.

8. Security

<Company Name>

Rental Redesign/ECARS 2.0
Use Case Specification: Reservation Notification (ARMS/UK Call Center)

Version 2.1

Revision History

Date	Version	Description	Author
3/26/01	1.0	Initial Draft of Use Case	M.Pallia
4/2/01	1.1	Finish initial draft of use case	M. Pallia & J. Gaines
4/5/01	1.2	More refinements to the Basic and alternate flows were made.	M. Pallia & J. Gaines
4/6/01	1.3	Changes to the name of the use-case, new alternate of no network connection, print the details alternate, special requirements #1 moved to the brief description.	M. Pallia
4/9/01	1.4	Wording refinements and clarification made per feedback from Cross team review.	J. Gaines & M. Pallia
4/11/01	2.0	User review changes to Title and usage of the Use Case. It was determined that this notification will be used more on a criticality basis rather than an origin basis. The first two reservation types that will have a status are the ARMS and Euro Call Center type reservations. The use case was changed to reflect the new direction.	M. Pallia
4/16/01	2.1	Changed the flow to reflect the European Flow to be identical to the North American Flow. I also made some other format and wording changes to help increase readability.	M. Pallia

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Use Case Specification: Reservation Notification (ARMS/UK Call Center)

1. Reservation Notification (ARMS/UK Call Center)

1.1 Brief Description

1.1.1 This use case defines the notification system that will alert a user when an "urgent" type reservation exists within the system. The use case will also describe the interactions a user must take to satisfy the notification.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins as soon as the user successfully logs onto the ECARS 2.0 Browser.

2.1.2 The system is aware that notification type reservations exist for the default terminal location . The first 2 types of reservations that will receive a notification are:

- Any reservation with that was created within the ARMS system (North America)
- Any reservation that was created at a UK Call Center (Europe) The UK Call Center Group and Branch Number is UK9Z

If the default terminal location is in Europe, the use case continues at alternate (UK Call Center)

(NOTE: For this iteration, UK9Z is the only branch, but more branches or other reservation types will eventually be added to this notification system.

2.1.3 The system determines the status of EACH notification type reservation.

A) For North America, the status of EACH reservation will be determined by one of the following:
- If the reservation is an ARMS origin type and has NOT been edited/viewed by the user, the reservation status is "Not Contacted"
- If the reservation is an ARMS origin type and has been edited/viewed but the user was UNABLE to contact the renter, the reservation status is "Contact Attempted"
- If the reservation is an ARMS origin type and has been edited/viewed but the user was ABLE to contact the renter, the reservation status is "Contacted"

(NOTE: Within the Edit/View use case, the user will determine whether the status of the reservation is "Contact Attempted" or "Contacted.")

2.1.4 If more that ONE notification type reservation exists, here are the multiple reservation possibilities:

- One or more of the reservations have a status of "Not Contacted" AND one or more of the reservations have a status of "Contact Attempted". If this is the case, the use case continues at alternate (Not Contacted and Contact Attempted)
- All of the reservations have a status of "Contacted". If this is the case, the use case continues at alternate (All Contacted)
- One or more of the reservations have a status of "Contact Attempted" AND NONE of the reservations have a status of "Not Contacted". If this is the case, the use case continues at alternate (Contact Attempted)
- One or more of the reservations have a status of "Not Contacted". If this is the case, the use case continues within the basic flow.

2.1.5 The system displays a notification to the user that at least one of the reservations has a status of "Not Contacted". The notification should be visible enough to draw immediate attention. (Almost to the point of annoying the user.)

2.1.6 The user can acknowledge the notification or not acknowledge the notification. If the user does not acknowledge the notification, the use case continues at alternate (Not Contacted - Not Acknowledged).

The system retrieves and displays a summary list of the reservations that caused the notification. he summary list should be displayed in the order in the table below Pick-up Date Pi ck-up Time Ren ter Name B ill-To Account Name R eservation Creation Date** Re servation Creation Time** R eservation Number
The sorting should be done using this method:

- Status –"Not Contacted" followed by "Contact Attempted"
- Pick-up Date – ascending
- Pick-up Time – ascending
- Renter's Name -- ascending

NOTE---Sort order for Pick-up date and time is as follows:

- Reservations with a date but no time.
- Reservations with a date and time.
- Reservations with no date but have a time.
- Reservations with no date and no time.

NOTE---Reservations with a status of "Contacted" will NOT be displayed in this summary list.

**These fields are the creation date and time when Legacy added it to the database, NOT when the reservation was added to the Oracle database.

2.1.7 The user has the option to do one or more of the following:

- Edit/view a reservation in the list
- Print the list
- Print the details of a reservation in the list
- Exit

If the user chooses to print the list, the use case continues at alternate (Print). If the user chooses to print the details of a reservation in the list, the use case continues at alternate (Print the Reservation Details). If the user chooses to exit the summary list, the use case continues at (2.1.3) in the Basic Flow. If the user chooses to edit/view, the use case continues.

2.1.8 The system initiates the edit/view use case

2.1.9 The use case continues at 2.1.2 in the basic flow

2.2 Alternate Workflows

2.2.1 UK Call Center

2.2.1.1 The system determines the status of EACH notification type reservation.

A) For Europe, the status of EACH reservation will be determined by one of the following :

- If the reservation was created by the UK Call Center and has NOT been edited/viewed. The reservation status is "Not Contacted"
- If the reservation was created by the UK Call Center and has been edited/viewed but the user was UNABLE to contact the renter, the reservation status is "Contact Attempted"
- If the reservation was created by the UK Call Center and has been edited/viewed but the

user was ABLE to contact the renter, the reservation status is "Contacted"
(NOTE: Within the Edit/View use case, the user will determine whether the status of the reservation is "Contact Attempted" or "Contacted.")

2.2.1.2 The system has determined the status of each reservation and the use case continues at (2.1.4) in the basic flow.

2.2.2 All Contacted

2.2.2.1 From the basic flow, when the system has ALL reservations that have a status of "Contacted", the system will not display any visible notification to the user. The use case continues at (2.1.2) in the basic flow.

2.2.3 Contact Attempted

2.2.3.1 From the basic flow, when the system finds at least one reservation with a status of "contact attempted" and no reservations with a status of "Not Contacted", the system will display a visible notification to the user. This notification will be less outstanding to the user than the notification used for a "Not Contacted" reservation. (NOTE: The user must also be able to differentiate this notification from the notification used for a "Not Contacted" reservation)

2.2.3.2 The user can acknowledge the notification or not acknowledge the notification. If the user does not acknowledge the notification, the use case continues at alternate (Contact Attempted-Not Acknowledged). Otherwise, the use case continues at (2.1.6) in the basic flow.

2.2.4 Print

2.2.4.1 From the basic flow, the use case includes the Print Reservation Use case. Otherwise, the user can select to do another option at (2.1.7) in the basic flow or the use case continues at (2.1.9) in the basic flow.

2.2.5 Print the Reservation Details

2.2.5.1 From the basic flow, the system initiates the Edit/View use case and the user can select to print the reservation details from there. Otherwise, the user can select to do another option at (2.1.7) in the basic flow or the use case continues at (2.1.9) in the basic flow.

2.2.6 Not Contacted - Not Acknowledged

2.2.6.1 From the basic flow, the system will continue to display the "Not Contacted" notification to the user until the user acknowledges the notification. When the user acknowledges the notification, the use case continues at (2.1.6) in the basic flow.

2.2.7 Contact Attempted – Not Acknowledged

2.2.7.1 From the basic flow, the system will continue to display the "Contact Attempted" notification to the user until the user acknowledges the notification. When the user acknowledges the notification, the use case continues at (2.1.6) in the basic flow.

2.2.8 Not Contacted and Contact Attempted

2.2.8.1 From the basic flow, the system displays the "Not Contacted" notification to the user.

2.2.8.2 The user can acknowledge the notification or not acknowledge the notification. If the user does not acknowledge the notification, the use case continues at alternate (Not Contacted -Not Acknowledged). Otherwise, the use case continues at (2.1.6) in the basic flow.

3. Special Requirements – Reservation Notification UC

- The notification should alert the user as close to real time as possible .

4. Pre-Conditions

- The user has successfully logged onto the ECARS 2.0 Application

5. Post-Conditions

6. Extension Points

7. FAQ

<Enterprise Rent A Car>

<ECARS 2.0 Reservation>
Use Case Specification: Reservation Forecasting

Version 1.2

Revision History

Date	Version	Description	Author
4/18/01	1.0	Initial Draft of the Use Case	M. Pallia
4/19/01	1.1	Removed a FAQ, changed the word calendar to a better description, removed the special requirements	M. Pallia
4/23/01	1.2	Reworded part of the basic flow to better clarify the 14-day period and table to be displayed. Added the ability for the user to change the start date. Increased Change location to include Group/ Branch and Group/All branches	M. Pallia

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Use Case Specification: Reservation Forecasting

1. Reservation Forecasting

1.1 Brief Description

This use case will describe the interactions between the system and a user when the user wants to view the total number of reservations per day over a two-week period.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when the system determines the group and branch number using the terminal's physical location and the local date and time. If the user changes the location, the use case continues at alternate (Change location).

2.1.2 The system retrieves the total number of reservations for each day with in the 14-day period, determined by the user, where the reservation pick-up date equals a day with in the 14-day period . If the user enters no date, the system will default the 14-day period to the current date and include the 13-days following the current date. (NOTE- the system will not retrieve any reservations that have a status of void)

2.1.3 The system displays:

- The Month, Day and Year of the First Day with in the 14-day period.
- The Month, Day and Year of the Last Day with in the 14-day period.
- A table showing the total number of reservations for each day within the 14-day period.
- The Month, Day and Day of the week for each day within the Table.

2.1.4 The user has the option to do one of the following:

- View the list of reservations for a specific day within the 14-day period.
- Move forward to the next 14-day period (if applicable)
- Move backward to the previous 14-day period (if applicable)
- Enter a different start date
- Refresh
- Exit

If the user chooses to view the list of reservations for a specific day within the 14-day period, the use case continues at alternate (Reservation List). If the user chooses to move forward to the next 14-day period, the use case continues at alternate (Next). If the user chooses to move to the previous 14-day period, the use case continues at alternate (Previous). If the user enters a different start date, the use case continues at alternate (Different Date). If the user chooses to Exit, the use case continues at (2.1.5) in the basic flow.

2.1.5 The use case ends

2.2 Alternative Flows

2.2.1 Next

2.2.1.1 From the basic flow, the user will want to view the number of reservations per day for the next 14-day period.

2.2.1.2 The system determines the next 14-day period. (The Next 14 day period includes the LAST day of the current 14-day period and the 13 days in the future to that day.)

2.2.1.3 The use case continues at (2.1.2) in the basic flow.

2.2.2 Previous

2.2.2.1 From the basic flow, the user will want to view the number of reservations per day for the previous 14-day period.

2.2.2.2 The system determines the previous 14-day period. (A Previous 14 day period includes the FIRST day of the current 14-day period and the 13 days prior to that day.)

2.2.2.3 The use case continues at (2.1.2) in the basic flow

2.2.3 Change Location

2.2.3.1 From the basic flow, the user has the option to change the location: Here are the different combinations a user may select:

- Same Group (as the terminal's physical location) and a different Branch with in that group

These will be available after the pilot of reservation

- Same Group (as the terminal's physical location) and all Branches with in that group.
- Different Group and a different Branch with in that Group
- Different Group and All branches within that Group

2.2.4 The user selects the branch drop down list.

2.2.5 The system will display the rental branches for the group, defaulting to the current location.

2.2.6 The user selects a branch from the drop down list.

2.2.7 The system will display a view of the selected branch's total number of reservations.

***As soon as the limitations of the Peoplesoft Hierarchy are amended, the user should have the option to select any level within the Enterprise Branch Hierarchy and all the levels below the selected level. This hierarchy includes: Branch, Area, City, Region and Group.

2.2.7.1 The System uses the new group and branch number selected as the location until the location is changed again. The use case continues at (2.1.2) in the basic flow.

2.2.8 Reservation List

2.2.8.1 From the basic flow, the user wants to see a list of the reservations with a pick-up date that equals the day selected within the 14-day period.

2.2.8.2 The system initiates the Daily Activity Use Case.

2.2.9 Different Date

2.2.9.1 From the basic flow, the user will want to view a 14-day period starting on a particular date. The user can enter this date manually or use a calendar control to select the date.

2.2.9.2 The system uses the date selected as the First day of the 14-day period. The use case continues at (2.1.2) in the basic flow.

2.2.10 Refresh

2.2.10.1 From the basic flow, the user chooses to refresh.

2.2.10.2 The system uses the current date; the group and branch selected and determines the 14-day period . The use case continues at (2.1.2) in the basic flow.

3. Reservation Forecasting UC Special Requirements

1. The user should be able to enter a date manually or select a date from a calendar control.

4. European Requirements

5. Pre-Conditions

1. The user has successfully logged in

6. Post-Conditions

7. Extension Points

8. J&M Q's

ECARS 2.0
Supplemental Specification: Print Reservation

Version 1.5

Revision History

Date	Version	Description	Author
9/7/01	1.0	First Draft	Mike Pallia
09/14/2001	1.1	Added all needed screen shots	James Atteberry
09/21/2001	1.2	Updated screen shots, added requirements for Res Summary	James Atteberry
10/18/2001	1.3	Cleaned document up: fixing page breaks and moving a few items around. Identified requirements. Also changed screen shot for "Reservation Details" because of CR#1802.	Dave Beebe
10/25/2001	1.4	Added step that shows what the system displays and how the user selects to print.	David Beebe
11/02/2001	1.5	Added new "Reservation Retro" prototype per Jon Jouris's 10/04/2001 user meeting.	Chris Carr

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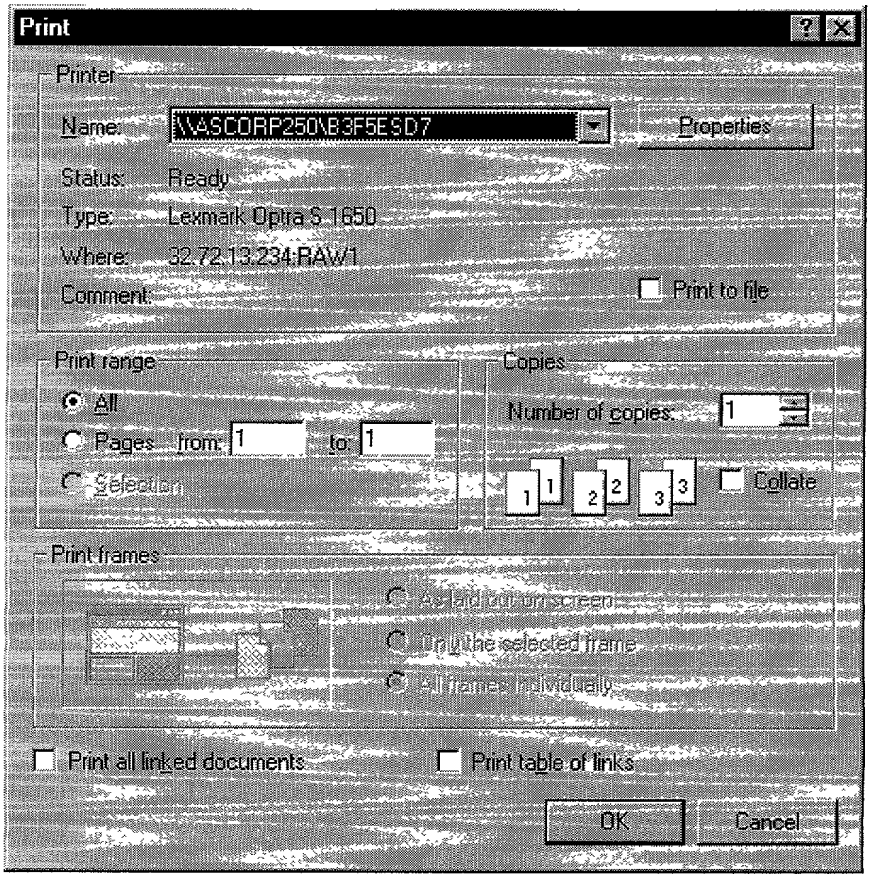
Supplemental Specification

1. Reservation Print

This document details out the print requirements for the Reservation sub-application.

1.1 Print Dialog Box

When the user selects any of the print options, the system will display the IE print dialog box . The user must select OK to initiate printing. There will be no Hot Keys, and the system will automatically fire the OK button if the user hits the enter key .



1.2 Reservation Search Screen

1.2.1 The system displays the option for the user to:

- Print Current Page
- Print All Records

1.2.2 Print Current Page

This function prints the records that are currently being displayed on the screen.

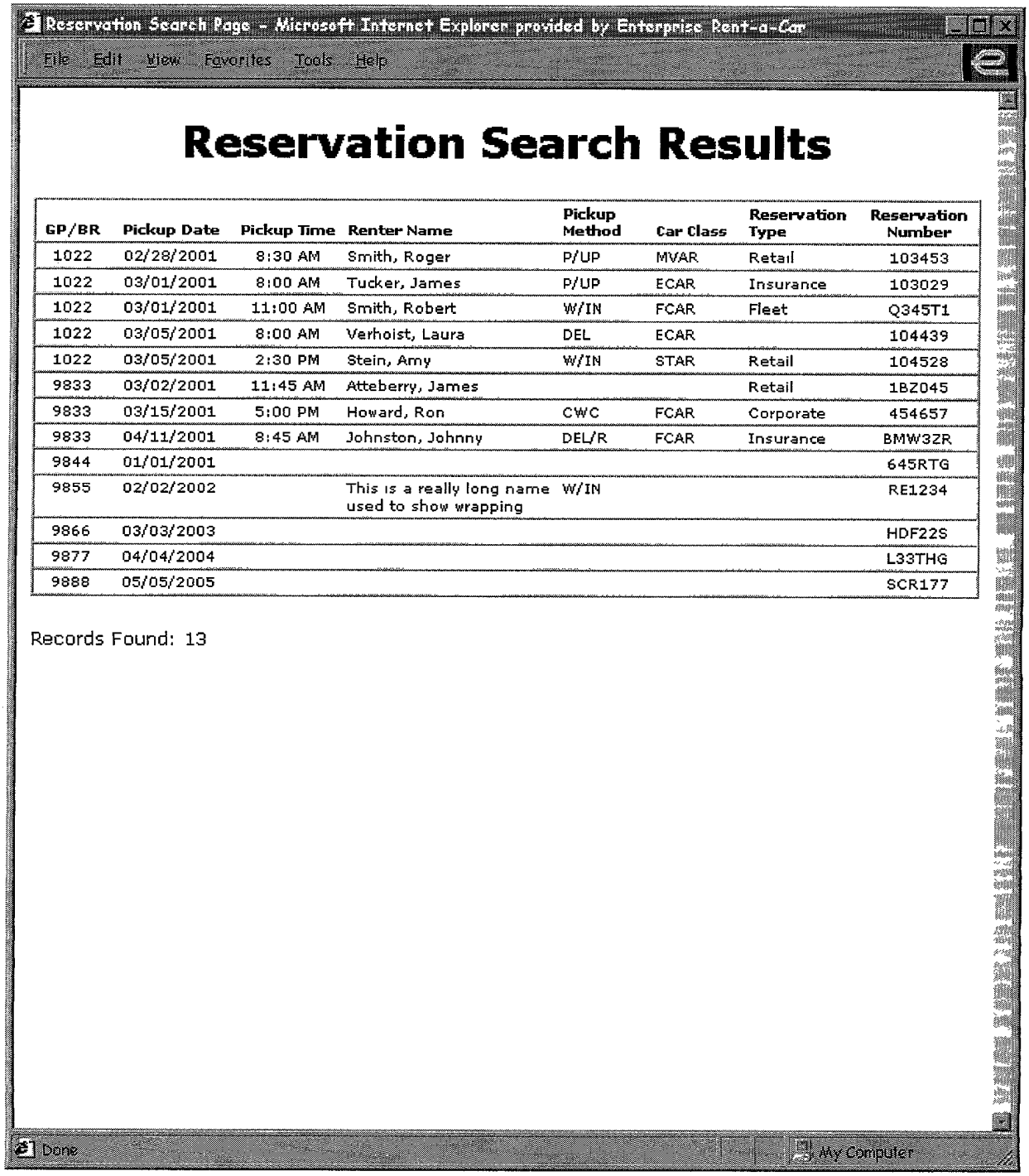
(NOTE: If the result set is broken down into groups of 20, this function will print the current set of 20 records regardless if they are all displayed on the screen.)

1.2.3 Print All Records

This function prints all the records that were returned from a search.

1.2.4 Print Output

The records when printed should look like this for both options: Print Current Page and Print All Records. If the amount of records exceeds one page, the column headers should appear at the top of every page.



Reservation Search Results

GP/BR	Pickup Date	Pickup Time	Renter Name	Pickup Method	Car Class	Reservation Type	Reservation Number
1022	02/28/2001	8:30 AM	Smith, Roger	P/UP	MVAR	Retail	103453
1022	03/01/2001	8:00 AM	Tucker, James	P/UP	ECAR	Insurance	103029
1022	03/01/2001	11:00 AM	Smith, Robert	W/IN	FCAR	Fleet	Q345T1
1022	03/05/2001	8:00 AM	Verhoist, Laura	DEL	ECAR		104439
1022	03/05/2001	2:30 PM	Stein, Amy	W/IN	STAR	Retail	104528
9833	03/02/2001	11:45 AM	Atteberry, James			Retail	1BZ045
9833	03/15/2001	5:00 PM	Howard, Ron	CWC	FCAR	Corporate	454657
9833	04/11/2001	8:45 AM	Johnston, Johnny	DEL/R	FCAR	Insurance	BMW3ZR
9844	01/01/2001						645RTG
9855	02/02/2002		This is a really long name used to show wrapping	W/IN			RE1234
9866	03/03/2003						HDF22S
9877	04/04/2004						L33THG
9888	05/05/2005						SCR177

Records Found: 13

1.3 Reservation Detail

1.3.1 The system displays the option for the user to Print. This action prints the details of the Reservation

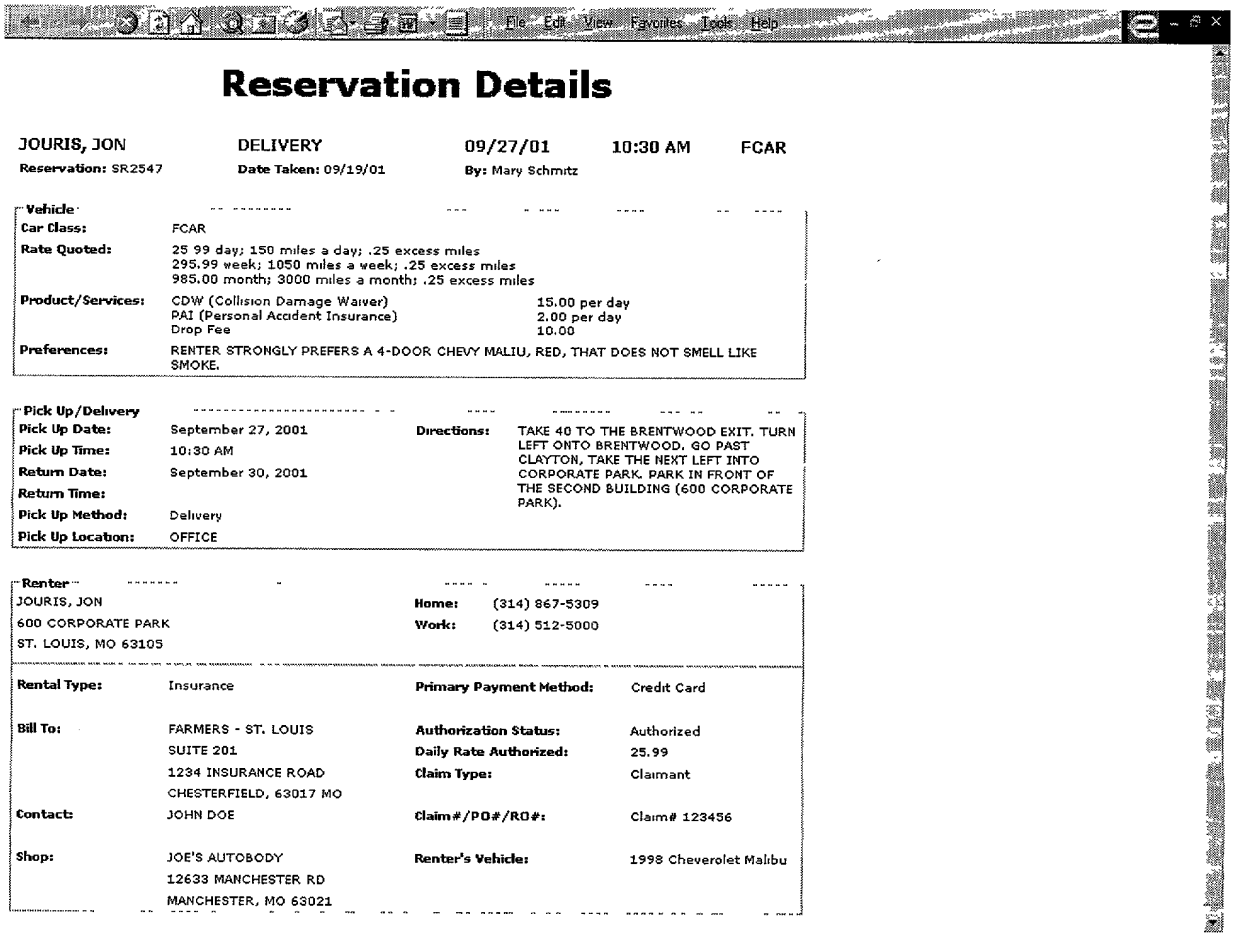
The user may select the print option at any time while creating, editing or viewing a reservation.

1.3.2 Print (Reservation Detail)

This function prints the Reservation Detail.

1.3.3 Print Output

The records when printed should look like this.



Reservation Details

JOURIS, JON | **DELIVERY** | **09/27/01** | **10:30 AM** | **FCAR**

Reservation: SR2547 **Date Taken:** 09/19/01 **By:** Mary Schmitz

Vehicle

Car Class:	FCAR	
Rate Quoted:	25 99 day; 150 miles a day; .25 excess miles 295.99 week; 1050 miles a week; .25 excess miles 985.00 month; 3000 miles a month; .25 excess miles	
Product/Services:	CDW (Collision Damage Waiver) PAI (Personal Accident Insurance) Drop Fee	15.00 per day 2.00 per day 10.00
Preferences:	RENTER STRONGLY PREFERS A 4-DOOR CHEVY MALIU, RED, THAT DOES NOT SMELL LIKE SMOKE.	

Pick Up/Delivery

Pick Up Date:	September 27, 2001	**Directions:**	TAKE 40 TO THE BRENTWOOD EXIT. TURN LEFT ONTO BRENTWOOD. GO PAST CLAYTON, TAKE THE NEXT LEFT INTO CORPORATE PARK. PARK IN FRONT OF THE SECOND BUILDING (600 CORPORATE PARK).
Pick Up Time:	10:30 AM		
Return Date:	September 30, 2001		
Return Time:			
Pick Up Method:	Delivery		
Pick Up Location:	OFFICE		

Renter

JOURIS, JON
600 CORPORATE PARK
ST. LOUIS, MO 63105

Home: (314) 867-5309
Work: (314) 512-5000

Rental Type:	Insurance	**Primary Payment Method:**	Credit Card
Bill To:	FARMERS - ST. LOUIS SUITE 201 1234 INSURANCE ROAD CHESTERFIELD, 63017 MO	**Authorization Status:** **Daily Rate Authorized:** **Claim Type:**	Authorized 25.99 Claimant
Contact:	JOHN DOE	**Claim#/PO#/RO#:**	Claim# 123456
Shop:	JOE'S AUTOBODY 12633 MANCHESTER RD MANCHESTER, MO 63021	**Renter's Vehicle:**	1998 Cheverolet Malibu

1.4 Reservation List Report Screen

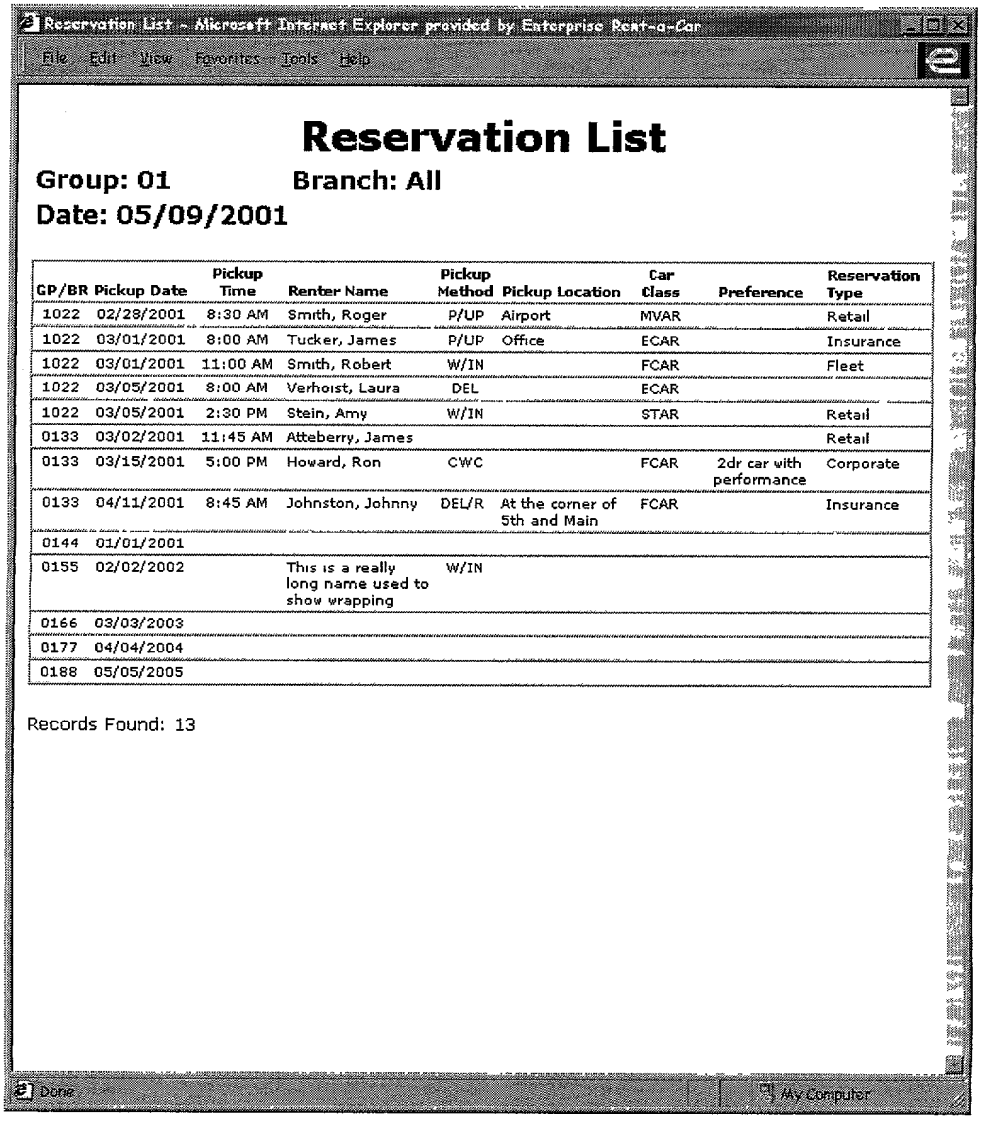
1.4.1 The system displays the option for the user to Print List:

1.4.2 Print List

This function prints the list that is currently displayed to the user.

1.4.3 Print Output

The records when printed should look like the print below.



GP/BR	Pickup Date	Pickup Time	Renter Name	Pickup Method	Pickup Location	Car Class	Preference	Reservation Type
1022	02/28/2001	8:30 AM	Smith, Roger	P/UP	Airport	MVAR		Retail
1022	03/01/2001	8:00 AM	Tucker, James	P/UP	Office	ECAR		Insurance
1022	03/01/2001	11:00 AM	Smith, Robert	W/IN		FCAR		Fleet
1022	03/05/2001	8:00 AM	Verhoist, Laura	DEL		ECAR		
1022	03/05/2001	2:30 PM	Stein, Amy	W/IN		STAR		Retail
0133	03/02/2001	11:45 AM	Atteberry, James					Retail
0133	03/15/2001	5:00 PM	Howard, Ron	CWC		FCAR	2dr car with performance	Corporate
0133	04/11/2001	8:45 AM	Johnston, Johnny	DEL/R	At the corner of 5th and Main	FCAR		Insurance
0144	01/01/2001							
0155	02/02/2002		This is a really long name used to show wrapping	W/IN				
0166	03/03/2003							
0177	04/04/2004							
0188	05/05/2005							

1.5 Reservation Summary Screen

1.5.1 The system displays the option for the user to Print Summary

1.5.2 Print Summary

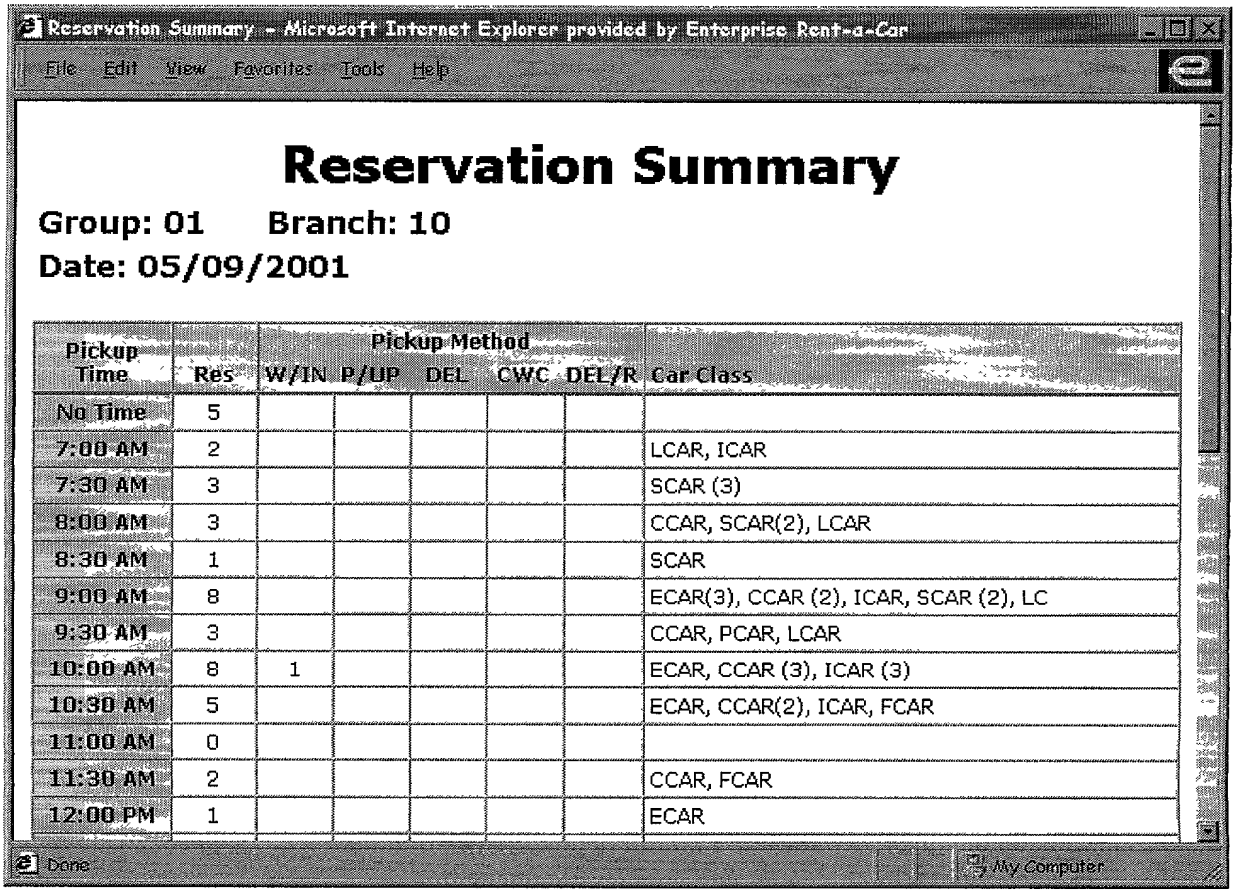
This function prints the table that is currently displayed to the user.

1.5.3 Print Output

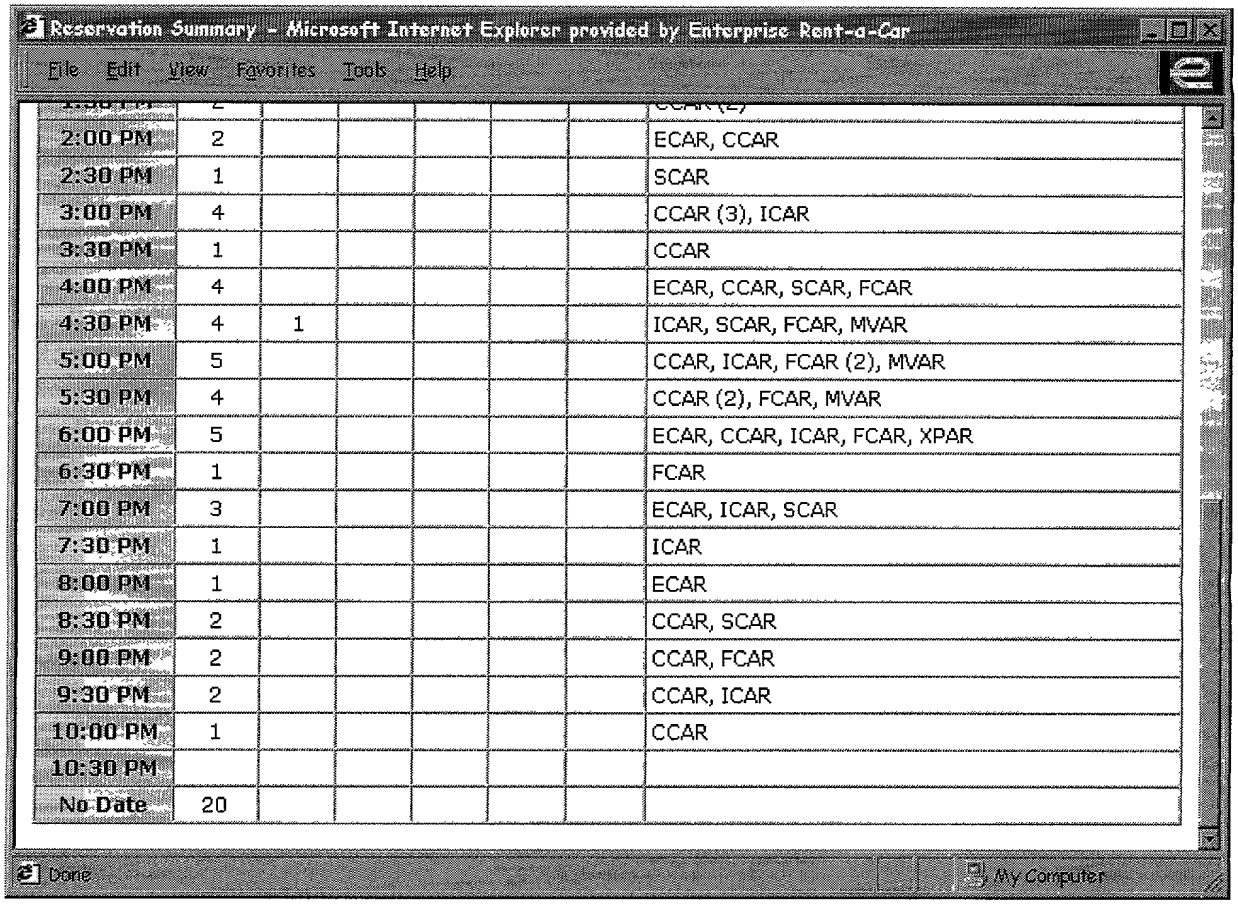
The records when printed should look the print below.

1.5.4 Special Requirements

The list should always start with the No Time row and end with the No Date row. In between are the individual time slot rows. The time should start with the branch open time, or the time of the first reservation, which ever is earlier. The time should end with the branch close time, or the time of the last reservation, which ever is later.



Pickup Time	Res	Pickup Method W/IN	P/UP	DEL	CWC	DEL/R	Car Class
No Time	5						
7:00 AM	2						LCAR, ICAR
7:30 AM	3						SCAR (3)
8:00 AM	3						CCAR, SCAR(2), LCAR
8:30 AM	1						SCAR
9:00 AM	8						ECAR(3), CCAR (2), ICAR, SCAR (2), LC
9:30 AM	3						CCAR, PCAR, LCAR
10:00 AM	8	1					ECAR, CCAR (3), ICAR (3)
10:30 AM	5						ECAR, CCAR(2), ICAR, FCAR
11:00 AM	0						
11:30 AM	2						CCAR, FCAR
12:00 PM	1						ECAR



2:00 PM	2						ECAR, CCAR
2:30 PM	1						SCAR
3:00 PM	4						CCAR (3), ICAR
3:30 PM	1						CCAR
4:00 PM	4						ECAR, CCAR, SCAR, FCAR
4:30 PM	4	1					ICAR, SCAR, FCAR, MVAR
5:00 PM	5						CCAR, ICAR, FCAR (2), MVAR
5:30 PM	4						CCAR (2), FCAR, MVAR
6:00 PM	5						ECAR, CCAR, ICAR, FCAR, XPAR
6:30 PM	1						FCAR
7:00 PM	3						ECAR, ICAR, SCAR
7:30 PM	1						ICAR
8:00 PM	1						ECAR
8:30 PM	2						CCAR, SCAR
9:00 PM	2						CCAR, FCAR
9:30 PM	2						CCAR, ICAR
10:00 PM	1						CCAR
10:30 PM							
No Date	20						

1.6 Renter Search

1.6.1 Print Current Page

This function prints the records that are currently being displayed on the screen.

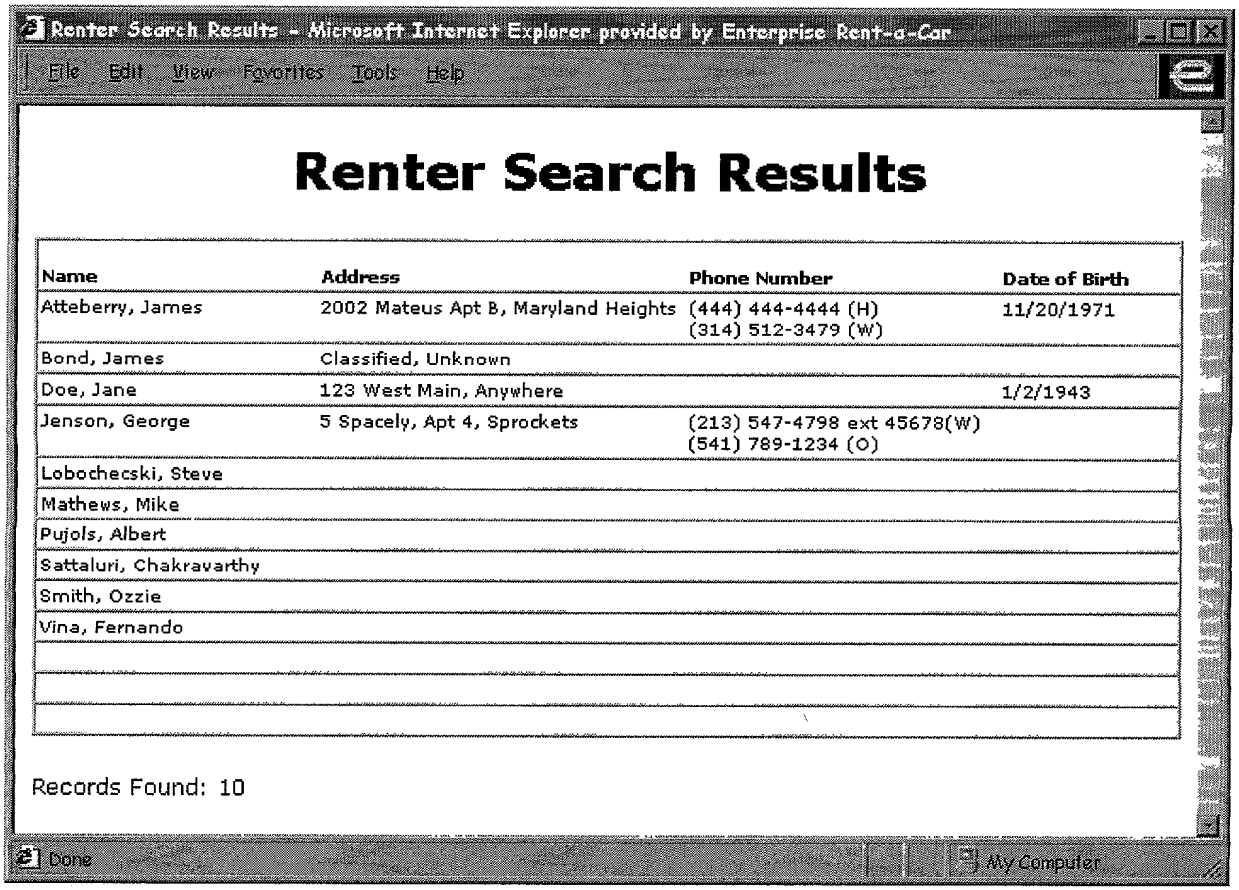
(NOTE: If the result set is broken down into groups of 20, this function will print the current set of 20 records regardless if they are all displayed on the screen.)

1.6.2 Print All Records

This function prints all the records that were returned from a search.

1.6.3 Print Output

The records when printed should look like this for both options: Print Current Page and Print All Records. If the amount of records exceeds one page, the column headers should appear at the top of every page.



1.7 Employee Search

1.7.1 Print Current Page

This function prints the records that are currently being displayed on the screen.

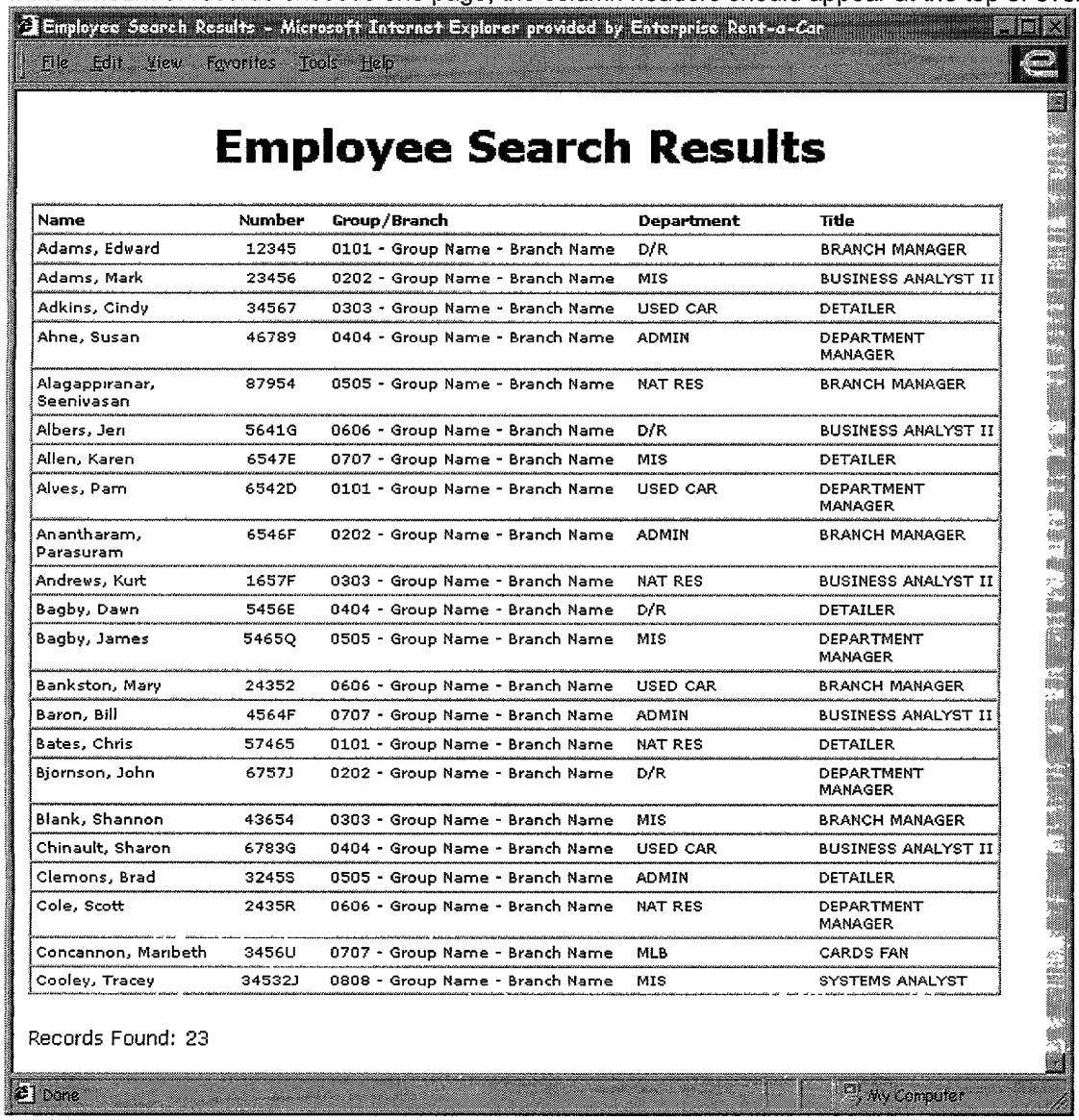
(NOTE: If the result set is broken down into groups of 20, this function will print the current set of 20 records regardless if they are all displayed on the screen.)

1.7.2 Print All Records

This function prints all the records that were returned from a search.

1.7.3 Print Output

The records when printed should look like this for both options: Print Current Page and Print All Records. If the amount of records exceeds one page, the column headers should appear at the top of every page.



1.8 Account Search

1.8.1 Print Current Page

This function prints the records that are currently being displayed on the screen.

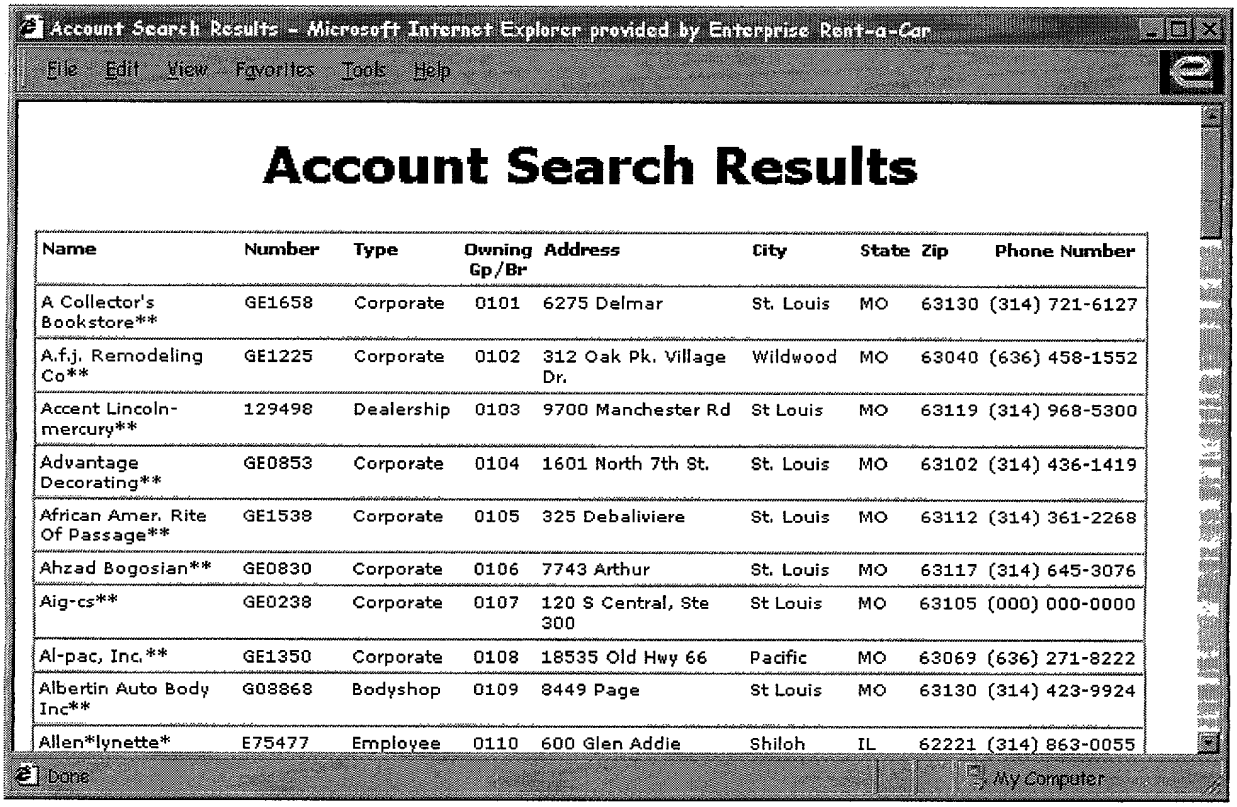
(NOTE: If the result set is broken down into groups of 20, this function will print the current set of 20 records regardless if they are all displayed on the screen.)

1.8.2 Print All Records

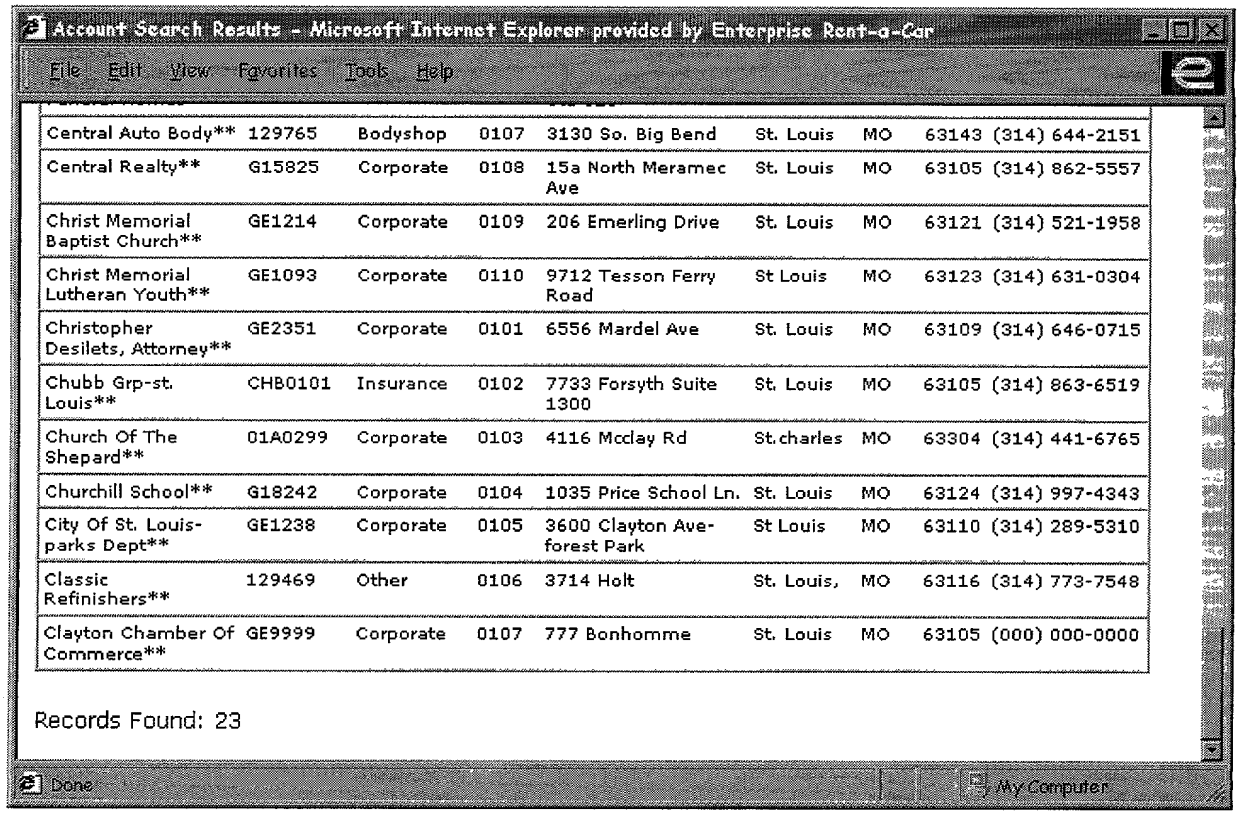
This function prints all the records that were returned from a search.

1.8.3 Print Output

The records when printed should look like this for both options: Print Current Page and Print All Records. If the amount of records exceeds one page, the column headers should appear at the top of every page.



Name	Number	Type	Owning Gp/Br	Address	City	State	Zip	Phone Number
A Collector's Bookstore**	GE1658	Corporate	0101	6275 Delmar	St. Louis	MO	63130	(314) 721-6127
A.f.j. Remodeling Co**	GE1225	Corporate	0102	312 Oak Pk. Village Dr.	Wildwood	MO	63040	(636) 458-1552
Accent Lincoln-mercury**	129498	Dealership	0103	9700 Manchester Rd	St Louis	MO	63119	(314) 968-5300
Advantage Decorating**	GE0853	Corporate	0104	1601 North 7th St.	St. Louis	MO	63102	(314) 436-1419
African Amer. Rite Of Passage**	GE1538	Corporate	0105	325 Debaliviere	St. Louis	MO	63112	(314) 361-2268
Ahzad Bogosian**	GE0830	Corporate	0106	7743 Arthur	St. Louis	MO	63117	(314) 645-3076
Aig-cs**	GE0238	Corporate	0107	120 S Central, Ste 300	St Louis	MO	63105	(000) 000-0000
Al-pac, Inc.**	GE1350	Corporate	0108	18535 Old Hwy 66	Pacific	MO	63069	(636) 271-8222
Albertin Auto Body Inc**	G08868	Bodyshop	0109	8449 Page	St Louis	MO	63130	(314) 423-9924
Allen*lynette*	E75477	Employee	0110	600 Glen Addie	Shiloh	IL	62221	(314) 863-0055



Central Auto Body**	129765	Bodyshop	0107	3130 So. Big Bend	St. Louis	MO	63143 (314) 644-2151
Central Realty**	G15825	Corporate	0108	15a North Meramec Ave	St. Louis	MO	63105 (314) 862-5557
Christ Memorial Baptist Church**	GE1214	Corporate	0109	206 Emerling Drive	St. Louis	MO	63121 (314) 521-1958
Christ Memorial Lutheran Youth**	GE1093	Corporate	0110	9712 Tesson Ferry Road	St Louis	MO	63123 (314) 631-0304
Christopher Desilets, Attorney**	GE2351	Corporate	0101	6556 Mardel Ave	St. Louis	MO	63109 (314) 646-0715
Chubb Grp-st. Louis**	CHB0101	Insurance	0102	7733 Forsyth Suite 1300	St. Louis	MO	63105 (314) 863-6519
Church Of The Shepard**	01A0299	Corporate	0103	4116 Mcclay Rd	St.charles	MO	63304 (314) 441-6765
Churchill School**	G18242	Corporate	0104	1035 Price School Ln.	St. Louis	MO	63124 (314) 997-4343
City Of St. Louis-parks Dept**	GE1238	Corporate	0105	3600 Clayton Ave-forest Park	St Louis	MO	63110 (314) 289-5310
Classic Refinishers**	129469	Other	0106	3714 Holt	St. Louis,	MO	63116 (314) 773-7548
Clayton Chamber Of Commerce**	GE9999	Corporate	0107	777 Bonhomme	St. Louis	MO	63105 (000) 000-0000

Records Found: 23

1.9 Reservation Notes

1.9.1 The system displays the option for the user to:

- Print All Records
- Print Note

1.9.2 Print All Records

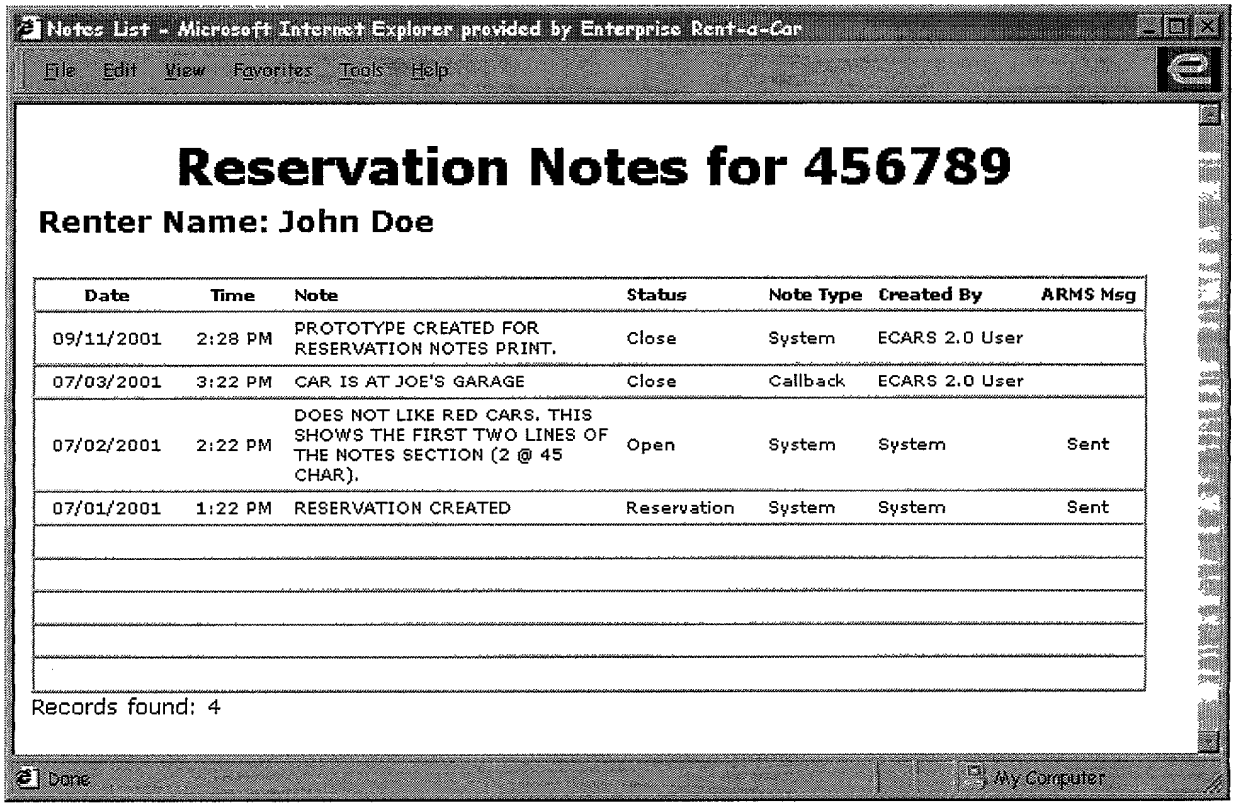
This function prints all the notes.

1.9.3 Print Note

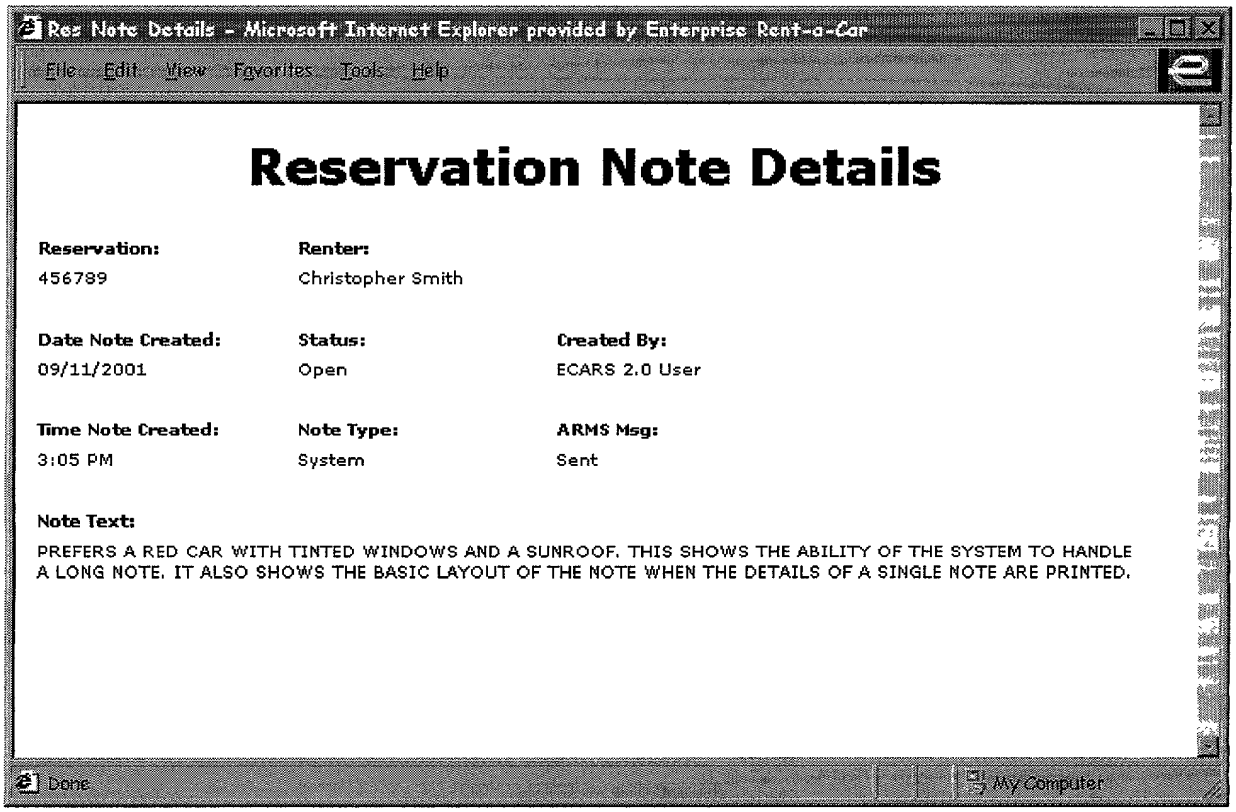
This function prints the note that is currently being displayed on the screen.

1.9.4 Print Output

When all the records when are printed, the output should look like this:



When an individual note is printed, the output should look like this:

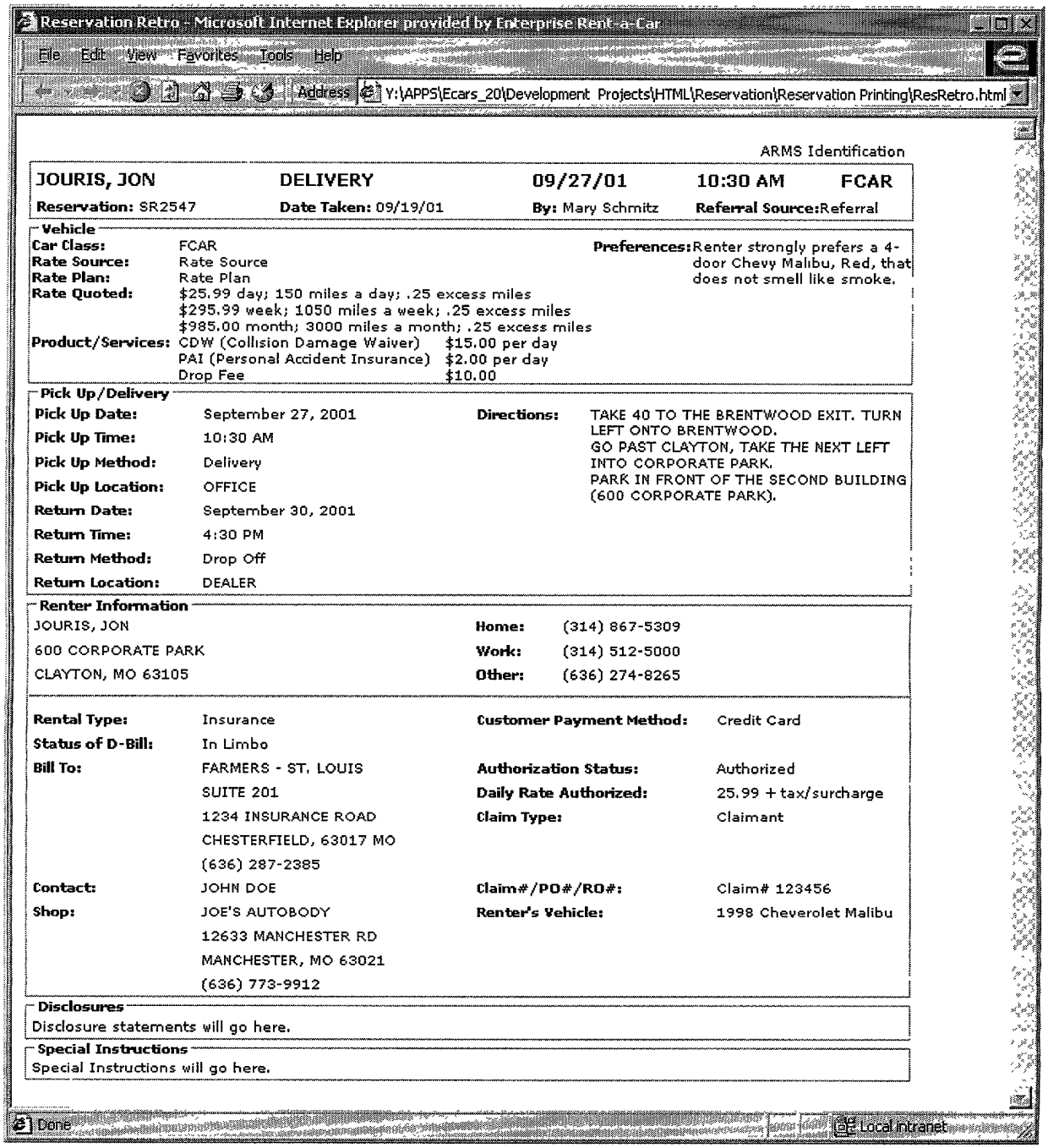


1.10 Reservation Retro (NOT part of the pilot release)

1.10.1 The system displays the option for the user to print a Reservation Retro statement. This action prints the details of the Reservation in a Retro format.

1.10.2 Print (Reservation Retro). This function prints the Reservation Retro.

1.10.3 Print Output. The records when printed should look like this.



Reservation Retro - Microsoft Internet Explorer provided by Enterprise Rent-a-Car

File Edit View Favorites Tools Help

Address Y:\APPS\Ecars_20\Development Projects\HTML\Reservation\Reservation Printing\ResRetro.html

ARMS Identification

JOURIS, JON	DELIVERY	09/27/01	10:30 AM	FCAR
Reservation: SR2547	**Date Taken:** 09/19/01	**By:** Mary Schmitz	**Referral Source:** Referral	

Vehicle

Car Class: FCAR
Rate Source: Rate Source
Rate Plan: Rate Plan
Rate Quoted: $25.99 day; 150 miles a day; .25 excess miles
$295.99 week; 1050 miles a week; .25 excess miles
$985.00 month; 3000 miles a month; .25 excess miles
Product/Services: CDW (Collision Damage Waiver) $15.00 per day
PAI (Personal Accident Insurance) $2.00 per day
Drop Fee $10.00

Preferences: Renter strongly prefers a 4-door Chevy Malibu, Red, that does not smell like smoke.

Pick Up/Delivery

Pick Up Date: September 27, 2001
Pick Up Time: 10:30 AM
Pick Up Method: Delivery
Pick Up Location: OFFICE
Return Date: September 30, 2001
Return Time: 4:30 PM
Return Method: Drop Off
Return Location: DEALER

Directions: TAKE 40 TO THE BRENTWOOD EXIT. TURN LEFT ONTO BRENTWOOD.
GO PAST CLAYTON, TAKE THE NEXT LEFT INTO CORPORATE PARK.
PARK IN FRONT OF THE SECOND BUILDING (600 CORPORATE PARK).

Renter Information

JOURIS, JON
600 CORPORATE PARK
CLAYTON, MO 63105

Home: (314) 867-5309
Work: (314) 512-5000
Other: (636) 274-8265

Rental Type: Insurance
Status of D-Bill: In Limbo
Bill To: FARMERS - ST. LOUIS
SUITE 201
1234 INSURANCE ROAD
CHESTERFIELD, 63017 MO
(636) 287-2385
Contact: JOHN DOE
Shop: JOE'S AUTOBODY
12633 MANCHESTER RD
MANCHESTER, MO 63021
(636) 773-9912

Customer Payment Method: Credit Card
Authorization Status: Authorized
Daily Rate Authorized: 25.99 + tax/surcharge
Claim Type: Claimant
Claim#/PO#/RO#: Claim# 123456
Renter's Vehicle: 1998 Cheverolet Malibu

Disclosures

Disclosure statements will go here.

Special Instructions

Special Instructions will go here.

Done Local intranet

<Enterprise Rent A Car>

ECARS 2.0 Reservation
Use Case Specification: <Reservation Home>

Version 1.0

Revision History

Date	Version	Description	Author
4/23/01	1.0	Initial Draft	Mike Pallia

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Use Case Specification: <Reservation Home>

1. Reservation Home

1.1 Brief Description

This use case describes the flow a user takes when interacting with the reservation planning use cases.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when the user successfully logs onto the ECARS 2.0 Reservation Browser.

2.1.2 The system initiates the Daily Activity Use Case

2.1.3 Primarily, the user will only view the displayed data and eventually the data will be manually refreshed . During this time, the user must also have the ability to select other options as well. The options available to the user are:

- Search for a reservation. The use case continues at alternate (Reservation Search)
- Forecast Reservation. The use case continues at alternate (Reservation Forecast)
- Edit a Reservation by entering a Reservation Number. The use case continues at alternate (Reservation Fast Path)
- Pick-up Summary. The use case continues at alternate (Pick-up Summary)
- Create a Reservation (**Not Developed Yet**). The use case continues at alternate (Create a Reservation)
- Get a Rate (**Not Developed Yet**). The use case continues at alternate (Get a Rate)
- ARMS/UK Call Center list. The use case continues at alternate (ARMS/UK Call Center)

2.1.4 The user refreshes the data and the use case continues at (2.1.2) in the basic flow. Otherwise, the use case ends.

2.2 Alternative Flows

2.2.1 Reservation Search

2.2.1.1 From the basic flow, the user may not be able to find the reservation they are looking for. The user will select the option to search for a reservation.

2.2.1.2 The system initiates the Reservation Search Use Case.

2.2.2 Reservation Forecast

2.2.2.1 From the basic flow, the user will want to see how many reservations have been made for a particular day or series of days in the near future. The user will select the option to view Reservation Forecasting.

2.2.2.2 The system initiates the Forecast Reservation use case.

2.2.3 Reservation Fast Path

2.2.3.1 From the basic flow, the user has a reservation number they would like to make changes to. Instead of using the search function, the user enters the reservation number into the edit reservation field.

2.2.3.2 The system initiates the Reservation Fast Path use case.

2.2.4 Pick Up Summary

2.2.4.1 From the basic flow, some branches will find the daily activity list is too detailed or difficult to use because of the large amount of reservations the branch has to manage. The user will opt to use the Pick Up Summary instead of the Daily Activity List.

2.2.4.2 The system initiates the Pick-Up Summary use case. (Note-When the user changes to the pick-up summary view rather than the Daily Activity.

2.2.5 Create a reservation

2.2.5.1 From the basic flow, the user will have a customer that needs to make a reservation. The user will choose to create a new reservation.

2.2.5.2 The system initiates the Create Reservation Use case.

2.2.6 Get a rate

2.2.6.1 From the basic flow, the user will need the ability to get a rate for a customer. The user will select the option to get a rate.

2.2.6.2 The system initiates the Get a Rate use case

2.2.7 ARMS/UK Call Center

2.2.7.1 The user has the ability to access the ARMS reservation list from the Reservation Home. The system initiates the ARMS/UK Call Center use case.

3. Special Requirements

4. European Requirements

5. Pre-Conditions

6. Post-Conditions

7. Extension Points

8. J&M Q's

Enterprise Rent-A-Car

Rental Redesign/ECARS 2.0
Use Case Specification: Search Reservation

Version <2.5>

Revision History

Date	Version	Description	Author
3/15/01	1.0	Initial Draft of Use Case	M.Pallia & J. Gaines
3/16/01	1.1	Revision after initial meeting with Tim Erickson	M.Pallia & J. Gaines
3/24/01	2.0	Final revisions before SA Review	M. Pallia & J. Gaines
3/26/01	2.1	Revisions based on SA review	J. Gaines & M. Pallia
3/27/01	2.2	Revisions based on Cross Team Review	J. Gaines
3/28/01	2.3	Final Revisions based on feedback from Hunt and Howard	J. Gaines
3/28/01	2.4	Final final Revisions based on walkthrough feedback from J. Atteberry	J. Gaines
3/29/01	2.5	Revised based on Jon Jouris review	J. Gaines
4/4/01	2.6	Revisions based on behavioral analysis and screen walk-throughs with John and Mary	J. Gaines
4/5/01	2.7	Revisions based on 2nd behavioral walk-through with Jon and Mary	J. Gaines
4/10/01	2.8	Tagging Requirements in Req Pro from updated use case	J. Gaines
9/7/01	2.9	Changed wording from Telephone Number to Phone Number.	L. Moellman

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Use Case Specification: Search Reservation

1. Search Reservation

1.1 Brief Description

This use case will describe how a user interacts with a system to search for and locate a reservation. It will show the flow of events that occur when a search is conducted to locate a reservation. The system will search for and locate a reservation (or more than one reservation) based on the search criteria entered by a user.

2. Flow of Events

2.1 Basic Flow

2.1.1 The use case begins when the user chooses to search for a reservation.

2.1.2 The system defaults the location to the Group and Branch number where the user logged in. {If the user changes location, the use case continues at alternate flow (Change Location)}.

2.1.3 The system displays all search criteria fields emptied out, allowing the user to enter specific search criteria as can be seen in Table's A and B.

Table A	Table B
These options are the most commonly selected. ▪ Driver's Last Name ▪ Driver's First Name (First name can only be used as a search criteria in conjunction with Last name) ▪ Phone number (any phone number associated with the driver) ▪ Reservation Number (Note: The current group branch location always displays)	These options are the less frequent options: ▪ A customer name (Bill-to, Referral, or Shop) ▪ A customer number (Bill-to, Referral, or Shop) ▪ Claim Number/Pol/Po No. (this is currently one field) ▪ A Range of Pick-up Dates ("from" to "to") ▪ Date reservation taken • Registration Number of Renter's vehicle (this will not be used in N. America) (Note: The current group branch location always displays)

2.1.4 The user enters a renter's last name. The system searches for a match on the text, starting from the first position in the field. (There is an implied wildcard at the end of the character set entered but no leading or imbedded wildcards within the character set).

2.1.5 The use case can continue at alternate flows (Range of Pick Up Dates through Registration Number of Renter's Vehicle). The use case can be read at any of these alternate flows (a user is most likely to search by the criteria in Table A more often than the criteria identified in Table B).

2.1.6 (Note: The user should not be allowed to start a search until one of the search criteria has been entered.)

2.1.7 The system initiates the search engine use case using the criteria entered by the user. The system receives the appropriate processing information from the Search Engine use case.

2.1.8 The system checks the status of the search. If the search has returned more than *n* records, the use case continues at alternate flow (Too Many Records). If the search returned no records, the use case continues at alternate flow (No Matches). If the search has exceeded the time allotted, the use case continues at alternate flow (Time Out). Otherwise, the use case continues along the main flow.

2.1.9 The system displays the results of the search, according to the Default Sort Order (2.3), in summary list form to the user.

2.1.10 The user can perform the following options:

- If the user chooses to print the list , the use case continues at alternate flow (Print the List).
- If the user elects to print the details of a reservation from the list , the use case continues at alternate flow (Print the Reservation Details).
- If the user picks a reservation from the list to edit/view , the use case continues at alternate flow (Edit/View a Reservation).

2.1.11 The use case ends

2.2 Alternate Workflows

2.2.1 Change Location

2.2.1.1 The user is allowed to change location dependant upon his level of security . See security document.

2.2.1.2 From the basic flow (2.1.2), the user can change location by changing the Group and Branch number, or the user can change location by changing just the Branch number . (Note: the user can also select to search "ALL" Group numbers and "ALL" Branches within a specific Group number.

2.2.2 The user selects the branch drop down list.

2.2.3 The system will display the rental branches for the group, defaulting to the current location.

2.2.4 The user selects a branch from the drop down list and the use case continues at (2.1.3) in the basic flow.

2.2.5 Too Many Records

2.2.5.1 From the basic flow (2.1.8), the system has returned more records than the governor allows.

2.2.5.2 The system displays the first series of records applying default sort order (2.3). UC2.20 The system also displays:

- Total number of records found.
- The system displays a range of records for the series .
- The system displays the ability to navigate to the next series of records.(if applicable)
- The ability to navigate to the previous series of records.(if applicable)

2.2.5.3 The user has the option to do the following:

- View the next series of records .
- View the previous series of records.
- Print the list of the current series or print the reservation details or edit/view a reservation from the list .
- Search again.

2.2.5.4 If the user chooses to view the next series (if applicable), the use case continues at (Too Many Records) . If the user chooses to view the previous series (if applicable), the use case continues at (Too Many Records). If the user chooses to print the list of the current series or print the reservation details or edit/view a reservation from the list, the use case continues at (2.1.10) in the basic flow . If the user chooses to search again, the use case continues at (2.1.3) in the basic flow . Otherwise, the use case continues at (2.1.11) in the basic flow.

2.2.6 UC2.6 Time Out

2.2.6.1 The system displays a message to the user that the time allotted to search has been exceeded.

2.2.7 No Matches

2.2.7.1 From the basic flow (2.1.6), the system will present a message to the user that no records were found for the criteria entered and show a 0 for the total number of records found. .

2.2.8 Print the List

2.2.8.1 From the basic flow (2.1.7.1), the system initiates the Print Use Case Specification Document. The use case continues at (2.1.10) of the basic flow.

2.2.9 Print the Reservation Details

2.2.9.1 From the basic flow (2.1.7.2), the system initiates the Print Use Case Specification Document. The use case continues at (2.1.10) of the basic flow.

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2.2.10 Edit/View a Reservation

2.2.10.1 From the basic flow (2.1.7.3), the system initiates the Edit/View Reservation Use Case Specification Document. The use case continues at (2.1.10) of the basic flow.

2.2.11 Search by Pick Up Date Range

2.2.11.1 The user chooses to search for a reservation(s) by entering the Range of Pick-up Dates on the reservation.

2.2.11.2 If the user only enters a "from" date, the system will default the "to" date to the same day that was entered.

2.2.11.3 The system validates that the "from" date must be less than or equal to the "To" date

2.2.11.4 The system will prompt the user if any of the validations are not correct , otherwise, the use case continues at (2.1.6) in the basic flow.

2.2.12 Search by Date Reservation Created

2.2.12.1 The user chooses to search for a reservation(s) by entering the date the reservation was created.

2.2.12.2 The system searches for a reservation by the entered reservation creation date.

2.2.12.3 The use case continues at (2.1.7) in the basic flow.

2.2.13 Search by a Customer Number

2.2.13.1 The user enters a specific customer number.

2.2.13.2 It has been decided that we will not narrow Customer Number Search by shop, bill-to or referral. The search will search the Bill-To and Shop fields ONLY on the reservation and a reservation that contains a match on any of the 2 fields will be returned.

2.2.13.3 The use case continues at (2.1.6) in the basic flow.

2.2.14 Search by an Account Name

2.2.14.1 The user enters an Account Name. The system searches for a match on the text, starting from the first position in the field . (There is an implied wildcard at the end of the character set entered but no leading or imbedded wildcards within the character set) .

2.2.14.2 The search will search the Bill-To and Shop fields ONLY on the reservation and a reservation that contains a match on any of the 3 fields will be returned

2.2.14.3 The use case continues at (2.1.6) in the basic flow.

2.2.15 Search by a Renter Phone Number (any phone number associated with the Renter)

2.2.15.1 The user enters a renter phone number. (The number entered must be the full number including area code.)

2.2.15.2 The system searches for a reservation with any matching renter phone number regardless of the phone number type (Home, Office, Other). (Match must be exact: no wildcard search.)

2.2.16 Search by Claim/Pol/Po No. The user enters either a Claim/Pol/Po No. in the Claim/Pol/Po field .

2.2.17 The user enters a Claim/Pol/Po No.. The system searches for a match on the text, starting from the first position in the field. (There is an implied wildcard at the end of the character set entered but no leading or imbedded wildcards within the character set) .

2.2.17.1 The use case continues at (2.1.6) in the basic flow.

2.2.18 Search by Renter's Vehicle Registration Number/License Plate Number

2.2.18.1 The user enters a Registration Number/License Plate Number of the Renter's Vehicle .

2.2.18.2 The system searches for a match on the text, applying from left to right on the number of characters for a reservation by the entered Registration Number/License Plate Number of the Renter's Vehicle.

2.2.18.3 The use case continues at (2.1.6) in the basic flow.

2.2.19 Search by Renter's First Name

2.2.19.1 The user enters a renter's first name. The system searches for a match on the text, starting from the first position in the field. (There is an implied wildcard at the end of the character set entered but no leading or imbedded wildcards within the character set). (Note: First name field is disabled until a valid value is entered in the last name field).

2.2.19.2 The use case continues at 2.1.5 of the basic flow.

2.3 Default Sort Order and Column Headers.

- This is the list of columns to display in the summary list and its sort priority for the first 4 columns;
- Pick up Group (ascending) Concatenate pick up group and branch.
- Pick up Branch (ascending)
- Date (ascending)
- Time (ascending)
- Renter Name (ascending) (Last name, First name) This is the format that renter name will display in the summary list.
- Pick Up Method
- Car Class
- Reservation Type
- Reservation Number

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2.3.1 Search by Reservation Number

2.3.1.1 The user enters a reservation number.

2.3.1.2 The system initiates the Search Engine use case using the reservation number entered.

2.3.1.3 The system searches for an exact match on the number entered starting from the first position in the field.

2.3.1.4 The system receives the appropriate processing information from the Search Engine use case.

2.3.1.5 The use case displays the results of the search according to the default sort order and column headers.

3. Special Requirements- Reservation Search UC

3.2 Any date entered by a user must have a month, day and year . The date search box will be one editable box . The search by date will also display a calendar .

3.3 For the pick up date range, the "TO" date will be deactivated until a "From" date is entered . After a "From" date is entered the "To" date will default to the "From" date entered .

3.4 Per our 4/3 meeting with Jon and Mary, Car class search was deleted from search res criteria.

3.5 Per our 4/5 meeting with Jon and Mary. There will be a link embedded in the Renter Name Column Header of the Summary list that when clicked on will take you into the reservation.

3.6 Per our 4/5 meeting with Jon and Mary. It was decided that on the search panel, the Customer Search Header would be called Account. The field Labels will be Account Name and Customer Number. The two fields will have radio buttons in front of them and upon initial presentation neither option will be selected.

4. Pre-Conditions

4.1 The user has successfully logged onto the system

5. Post-Conditions

6. Extension Points

7. FAQ

<Company Name>

ECARS 2.0 - Referral Source Screen Action Specification

Revision History

Date	Version	Description	Author
6/21/2001	1.0	Created Document	Johnny S. Johnston
7/13/2001	1.1	Updated for OO modeler review	Johnny S. Johnston
8/8/2001	1.2	Updated for contact requirement changes	Johnny S. Johnston
9/6/2001	1.3	Updated wording from Telephone Number to Phone Number. Changed Phone Number column from sortable to not sortable.	L. Moellman
10/08/2001	1.4	Replaced Account and Employee Search screen shots with the versions that do not have print buttons.	Chris Carr

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Referral Source screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Referral Source Screen

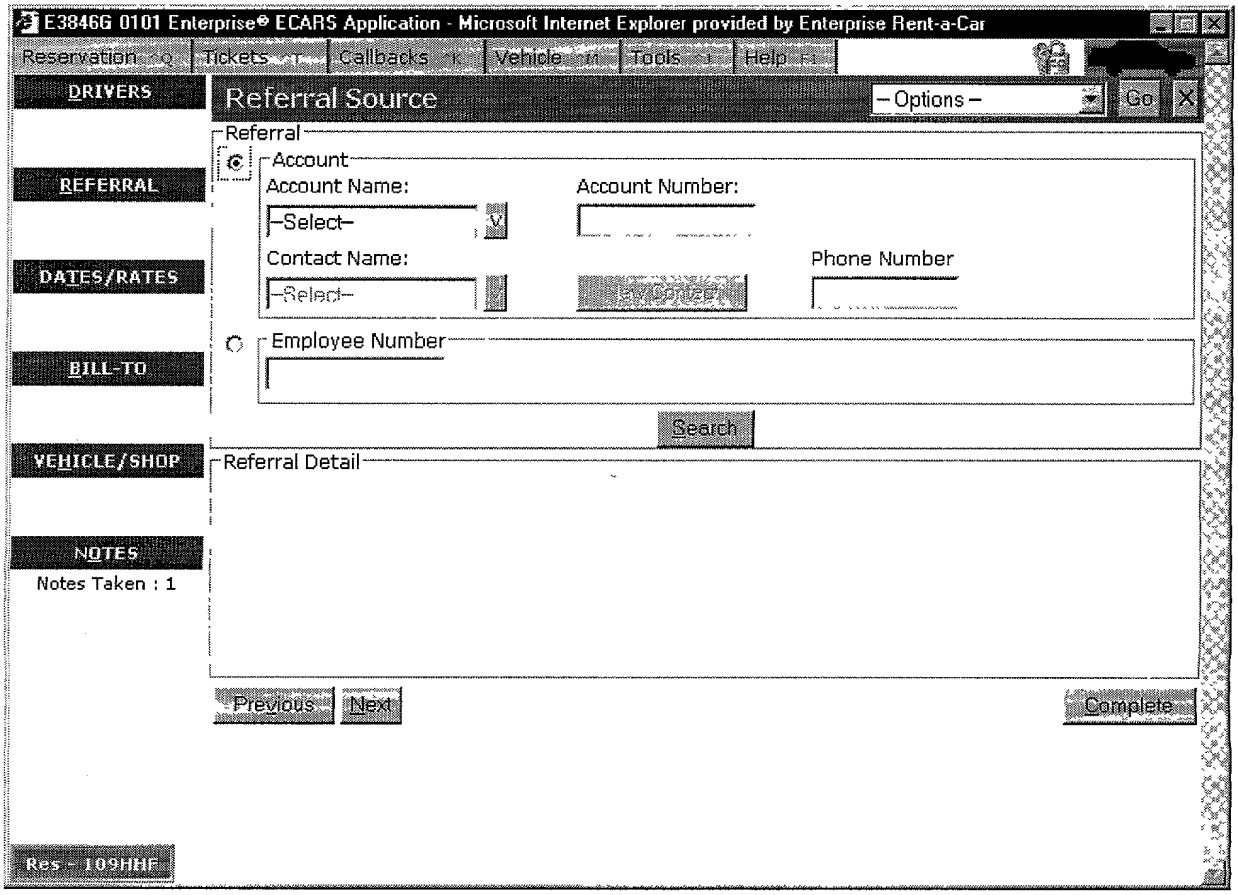
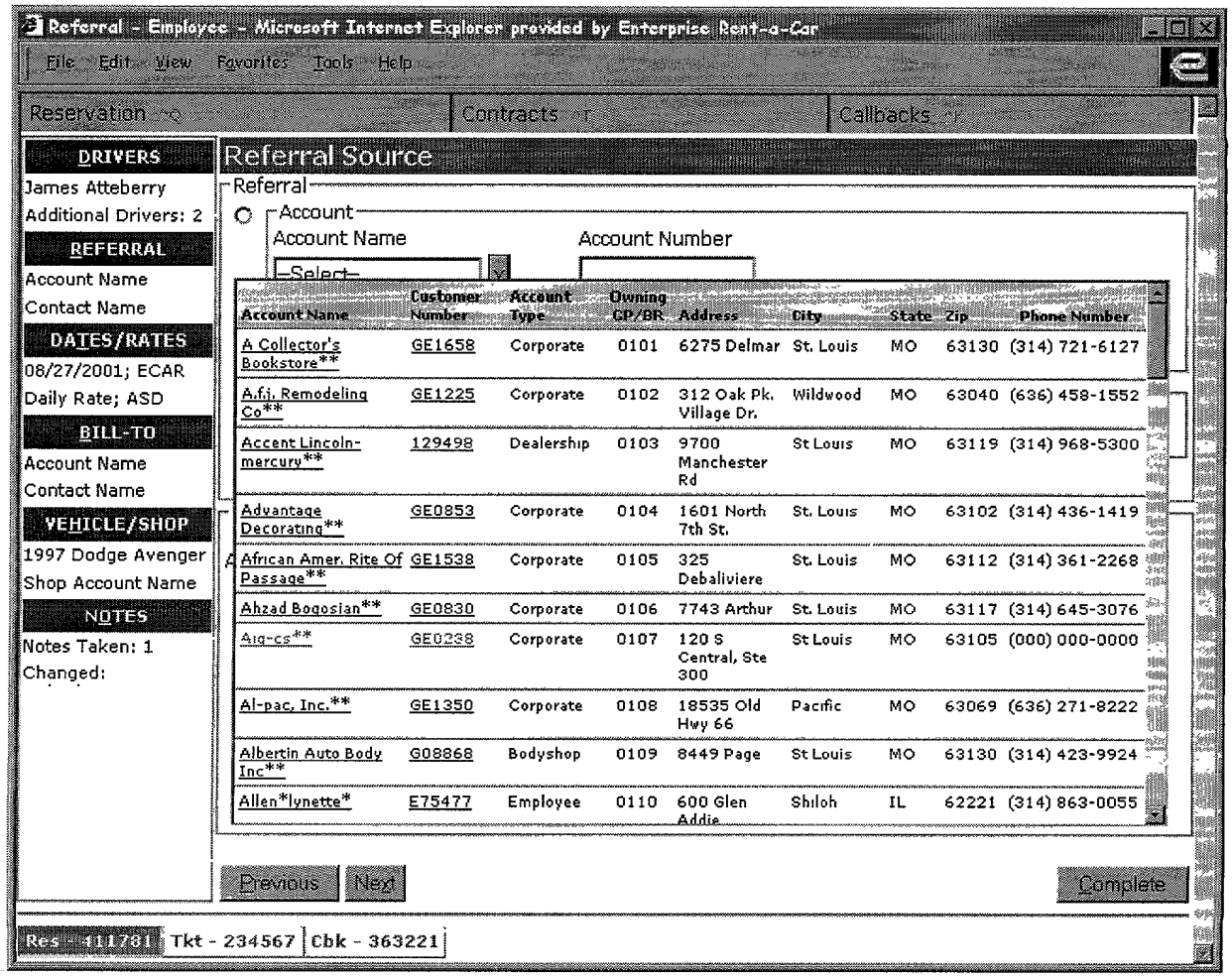


Figure 1 – Referral Source Screen

Figure 2 – Referral Source Screen (Employee selected)


Referral - Employee - Microsoft Internet Explorer provided by Enterprise Rent-a-Car
File Edit View Favorites Tools Help
Reservation
Contracts
Callbacks
DRIVERS
James Atteberry
Additional Drivers: 2
REFERRAL
Account Name
Contact Name
DATES/RATES
08/27/2001; ECAR
Daily Rate; ASD
BILL-TO
Account Name
Contact Name
VEHICLE/SHOP
1997 Dodge Avenger
Shop Account Name
NOTES
Notes Taken: 1
Changed:
Referral Source
Referral
Account
Account Name
Account Number
--Select--
Account Name | Customer Number | Account Type | Owning CP/BR | Address | City | State | Zip | Phone Number
A Collector's Bookstore** | GE1658 | Corporate | 0101 | 6275 Delmar | St. Louis | MO | 63130 | (314) 721-6127
A.f.i. Remodeling Co** | GE1225 | Corporate | 0102 | 312 Oak Pk. Village Dr. | Wildwood | MO | 63040 | (636) 458-1552
Accent Lincoln-mercury** | 129498 | Dealership | 0103 | 9700 Manchester Rd | St Louis | MO | 63119 | (314) 968-5300
Advantage Decorating** | GE0853 | Corporate | 0104 | 1601 North 7th St. | St. Louis | MO | 63102 | (314) 436-1419
African Amer. Rite Of Passage** | GE1538 | Corporate | 0105 | 325 Debaliviere | St. Louis | MO | 63112 | (314) 361-2268
Ahzad Bogosian** | GE0830 | Corporate | 0106 | 7743 Arthur | St. Louis | MO | 63117 | (314) 645-3076
Aig-cs** | GE0238 | Corporate | 0107 | 120 S Central, Ste 300 | St Louis | MO | 63105 | (000) 000-0000
Al-pac, Inc.** | GE1350 | Corporate | 0108 | 18535 Old Hwy 66 | Pacific | MO | 63069 | (636) 271-8222
Albertin Auto Body Inc** | G08868 | Bodyshop | 0109 | 8449 Page | St Louis | MO | 63130 | (314) 423-9924
Allen*lynette* | E75477 | Employee | 0110 | 600 Glen Addie | Shiloh | IL | 62221 | (314) 863-0055
Previous
Next
Complete
Res - 111781
Tkt - 234567
Cbk - 363221

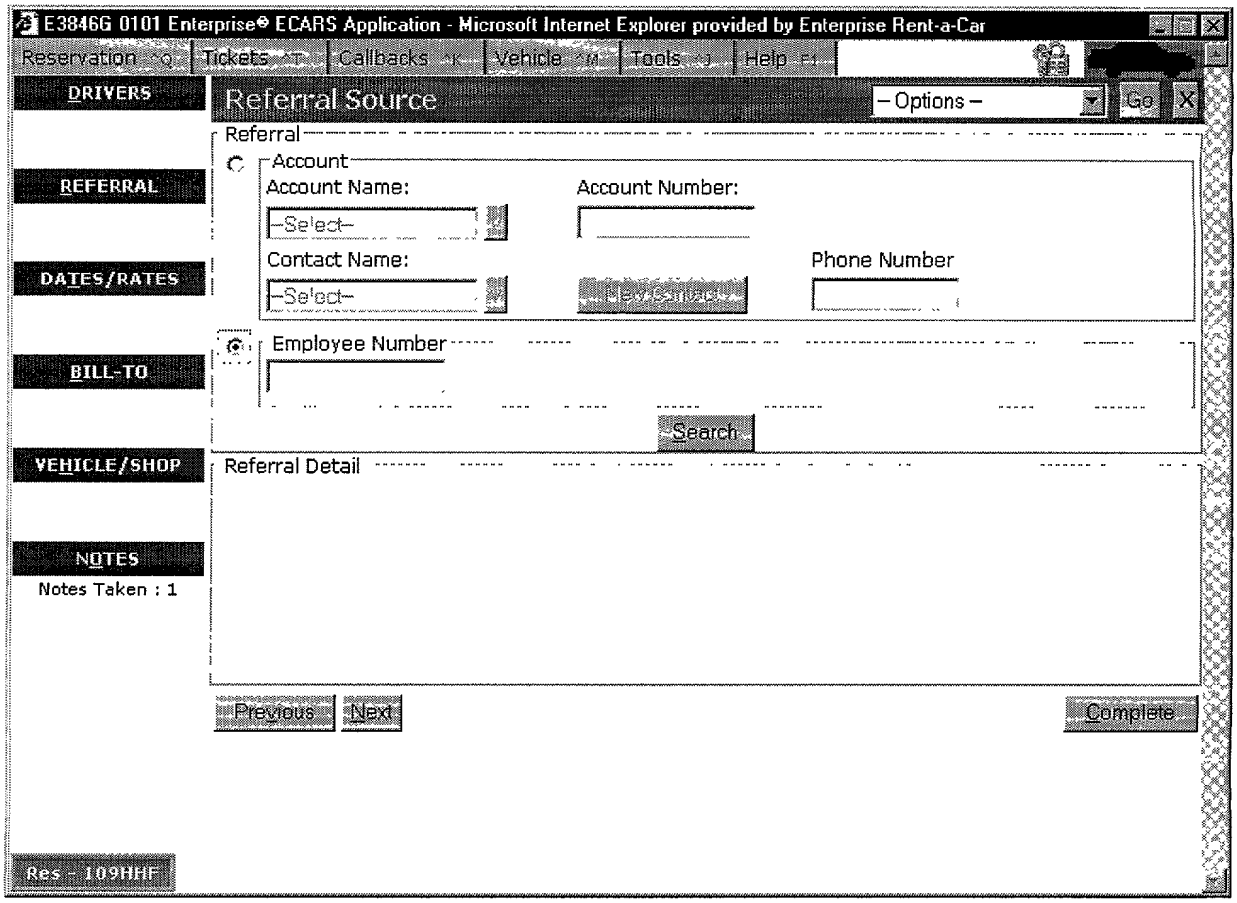


Figure 3 – Referral with Branch Short List

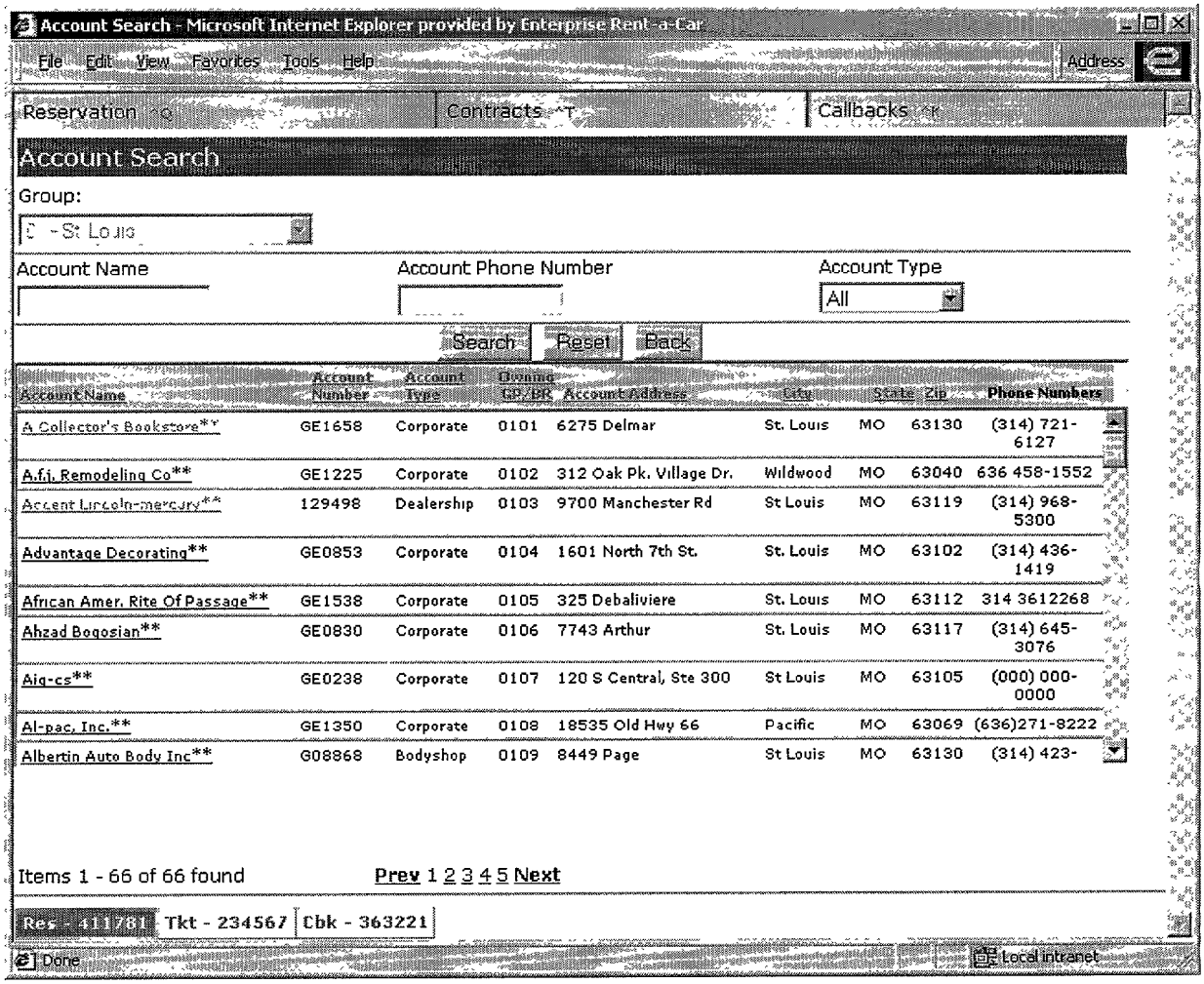


Figure 4 – Account Search Screen

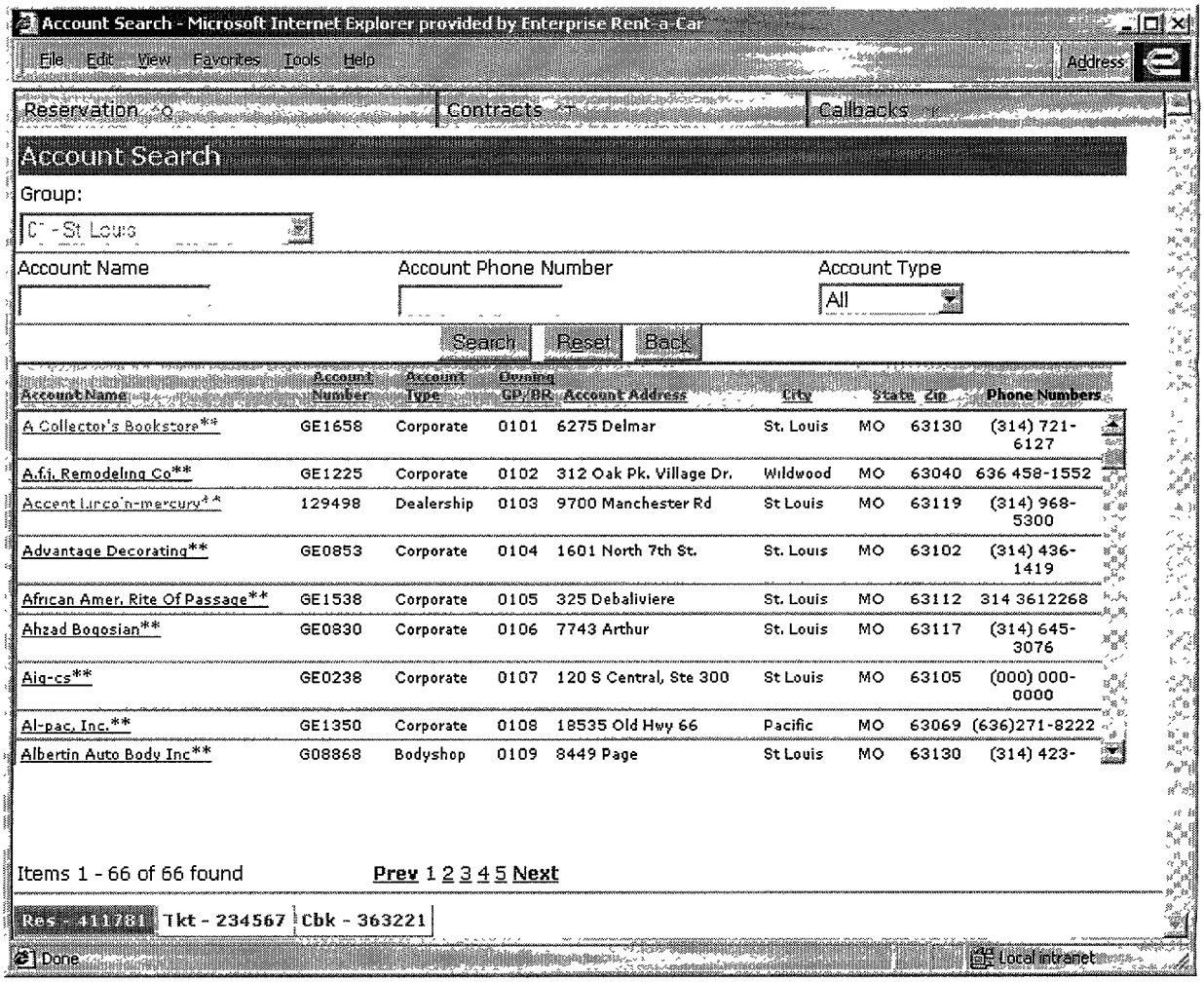


Figure 4.1 – Account Search screen for Pilot Reservation only

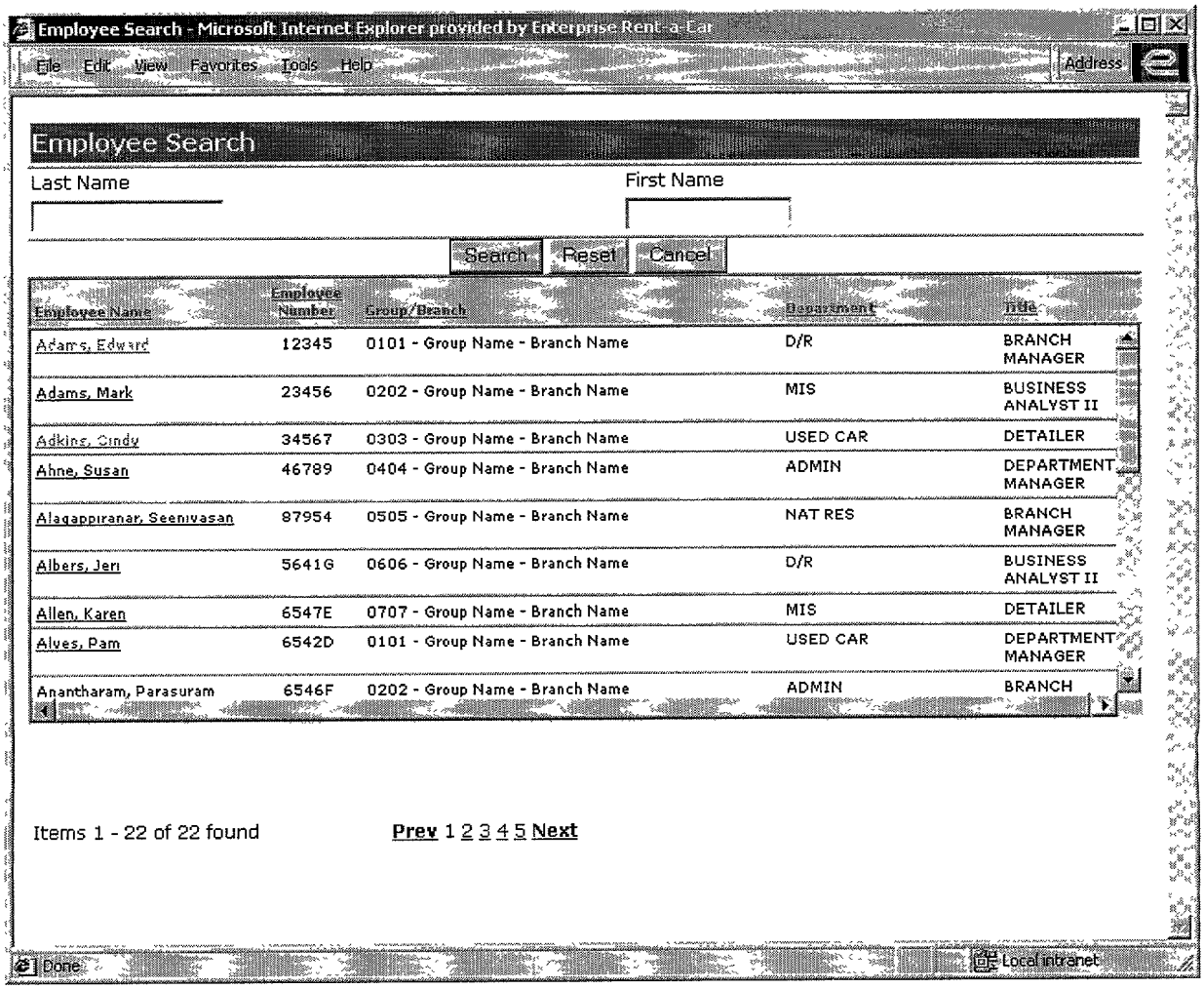


Figure 5 – Employee Search Screen

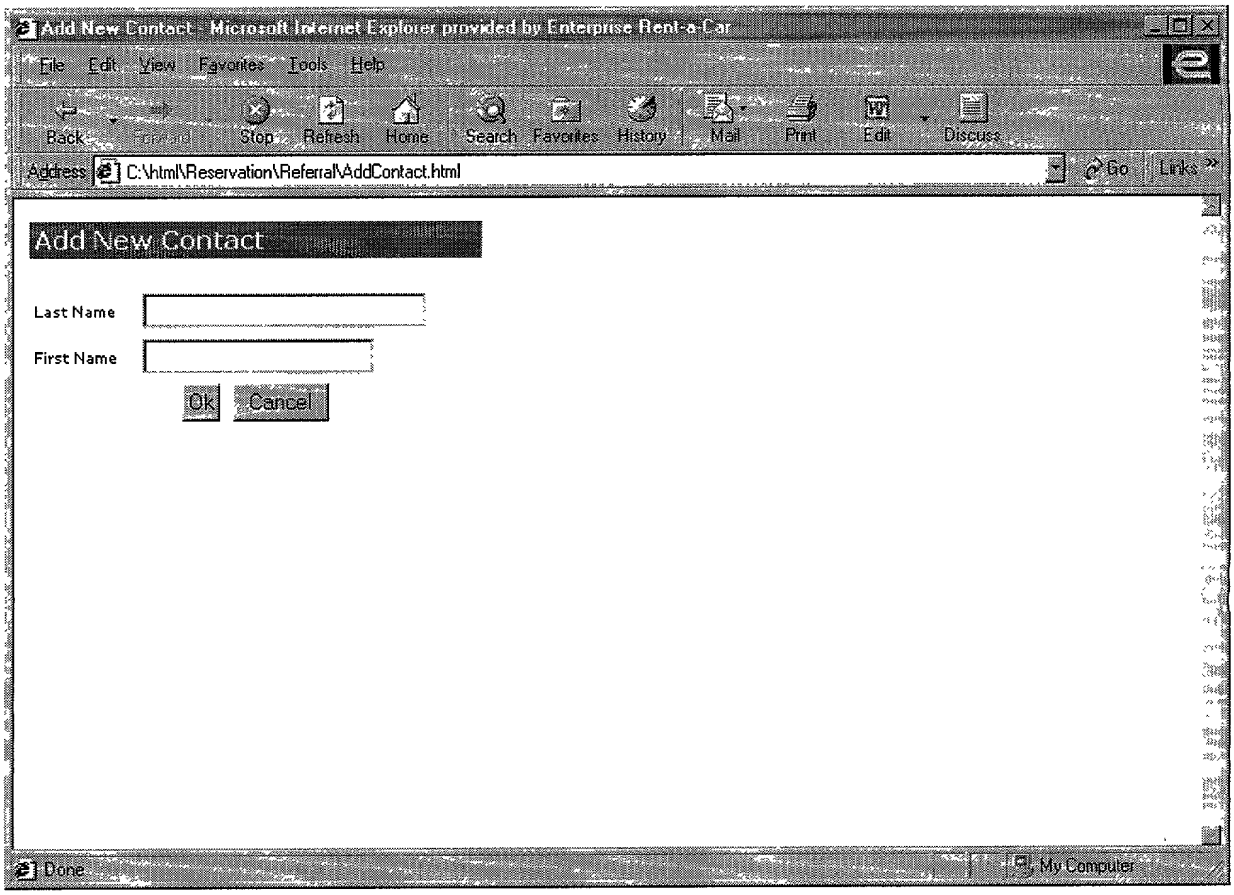


Figure 6 – Add New Contact Screen

3. Reservation Number

3.1 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation number will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message stating, "A maximum of 3 reservations may be displayed".

3.4 System Exceptions

None identified at this time.

4. Referral Title Bar Area

4.1 Behavior

The open area in the Referral Title Bar will allow the user to access transaction-=wide functions. These functions for Reservation are: -- Options --, Print, Void and Transfer. The default option is "—Options – ". The user must press the Go button to initiate the selected function.

The Title Bar button area in the Referral Title Bar contains two buttons – a Go button and a Close button.

The Go button is always active, and is used to initiate a function selected in the Option area. If the selected option is "—Options –", nothing should happen .

The Close button is always active and is used to close the current transaction. The button is labeled with an 'X'. Pressing this button will cause a confirmation popup, asking the user if they wish to cancel the transaction and lose all changes. If the user selects 'Yes', the transaction is closed with no changes saved to the database.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Account and Employee Number Radial Button

5.1 Behavior

These two buttons are mutually exclusive. Only one or the other may be selected. If a radial button is selected, with out any other information input and then the search button is selected, and then the appropriate search panel is presented. For example, if the Account radial button is selected, no information is entered, and the search button is selected, then the Account Search panel is displayed. If the Employee Number radial button is selected, no information is entered, and the search button is selected, then the Employee Search panel is displayed. This should default to the "Account" selection.

5.2 Validation

None identified at this time.

5.3 Business Exceptions

None identified at this time.

5.4 System Exceptions

The system will only allow one or the other to be selected .

6. Account Name/Short List Area

6.1 Behavior

This area is a drop down area comprised of the Branch's short list. If a search is executed on the account number and a single, valid match is found, this area will be filled with the corresponding account name.

Information displayed in the short list is:

- Account Name
- Account Number
- Account Type
- Owning Group and Branch Number
- Account Street Address
- Account City
- Account State
- Account Zip Code
- Account Telephone Number(s)

By selecting an Account from this short list all of the appropriate information will be populated into the detail section.

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. Account Number Area

7.1 Behavior

This is a free form alphanumeric area. An entry into this area is valid to execute a search.

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Contact Name Area

8.1 Behavior

This area is disabled and unpopulated until a valid Account Name and/or Account Number has been selected, or entered and the detail returned from the database. Once a single and valid Account has been returned then this will be a drop down list populated with the contact(s) associated with that Account.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time.

9. Phone Number

Behavior

This is an alphanumeric field that is populated with the contact phone number once a contact is selected by the user. Once the field is populated, the user should have the ability to change this field. It the user changes the field; the changes will only be saved at the transaction level and will not affect the reference data. For reservation pilot, all of the contacts will display the account phone number in the Contact phone number field. This is because currently, we are not storing contact phone numbers or extensions with for a particular account.

9.1 Validation

None identified at this time

9.2 Business Exceptions

None identified at this time

9.3 System exceptions

None identified at this time.

10. New Contact Button

10.1 Behavior

Selecting this button will display the New Contact panel. The button is not enabled until a valid Account Name or Number is entered or selected and the detail is displayed.

10.2 Validation

None identified at this time.

10.3 Business Exceptions

If the Account Type, associated with this Account is Fleet, then this button will be disabled.

10.4 System Exceptions

None identified at this time.

11. Employee Number Area

11.1 Behavior

This area is a free form text area that will allow the user to input alphanumeric values. An entry to this area is valid to execute a search.

11.2 Validation

None identified at this time.

11.3 Business Exceptions

None identified at this time.

11.4 System Exceptions

None identified at this time.

12. Search Button

12.1 Behavior

A search may be executed if either the Account Number area has values entered or the Employee Number area has values entered. The system will search for exact matches and display either the detail if a single match is found or the Account Search panel or Employee search panel if multiple matches are found. If neither area has values entered and the search button is executed then either the Account Search panel or the Employee Search panel will be displayed depending on which radial button is selected.

12.2 Validation

None identified at this time.

12.3 Business Exceptions

If no matches are found the message "0 record of 0 records were found". Or whatever the standard verbiage is displayed.

12.4 System Exceptions

None identified at this time.

13. Referral Detail Area

13.1 Behavior

This are will be populated with either Account or Employee Number detail if a single match is found.

For an Account the displayed information is:

- Account Name
- Account Number
- Owning Group and Branch
- Account Type
- Street Address
- City
- State
- Zip
- Phone Number(s)

From Special Instructions

- 2 "Hot" lines
- Miscellaneous Information
- Discounts
- Rules
- Products

For an Employee the displayed information is:

- Employee Name
- Employee Number
- Group and Branch Number
- Group and Branch Description
- Department
- Title

13.2 Validation

None identified at this time.

13.3 Business Exceptions

None identified at this time.

13.4 System Exceptions

None identified at this time.

14. Button Line Area

14.1 Behavior

The Previous button will take the user to the Driver screen within the same transaction.

The Next button will take the user to the Dates/Rates within the same transaction.

The Complete button will initiate a save of the transaction. All validations will be performed, returning any errors to the user . If there are no errors, the transaction is saved and the user is returned to the Reservation home page.

14.2 Validation

None identified at this time.

14.3 Business Exceptions

None identified at this time.

14.4 System Exceptions

None identified at this time.

15. Search - Group Area

15.1 Behavior

This area will be a drop down list of all groups. It will default to the terminal's group. The option of All is also available. For reservation pilot, the user will not be able to change the group value.

15.2 Validation

None identified at this time.

15.3 Business Exceptions

None identified at this time.

15.4 System Exceptions

None identified at this time.

16. Search - Account Name Area

16.1 Behavior

This area will allow entry of alphanumeric values. The system will search on exact matches for the values entered with an implied wild card at the end.

16.2 Validation

None identified at this time.

16.3 Business Exceptions

If no matches are found the message "0 record of 0 records were found". Or whatever the standard verbiage is displayed.

16.4 System Exceptions

None identified at this time.

17. Search – Account Phone Number Area

17.1 Behavior

This area will allow entry of alphanumeric values. The system will search on exact matches without any implied wild cards.

17.2 Validation

None identified at this time.

17.3 Business Exceptions

If no matches are found the message "0 record of 0 records were found". Or whatever the standard verbiage is displayed.

17.4 System Exceptions

None identified at this time.

18. Search – Account Type Area

18.1 Behavior

This area will be a drop down list of account types. It will default to All.

The domain values are:

- Body Shop
- Corporate
- Government
- Fleet
- Dealership
- Insurance
- Other
- All

18.2 Validation

None identified at this time.

18.3 Business Exceptions

The system cannot execute a search on Account Type alone. Either a Group, Account Name and/or Account Phone Number is also required. If only Account Type is selected a message is displayed "Must specify another search criteria".
A search cannot be executed if the Group selection is "All" and the Account Type selection is "All", with Account Name and Account Phone Number without values. Group or Account Type must have a value selected. If both are "All" display error message to user "Group and Account Type cannot both be All".

18.4 System Exceptions

None identified at this time.

19. Search – Display Area

19.1 Behavior

The result display will initially be blank on first presentation of the panel and until at least one search is executed and at least one record is found that matches the search criteria.

This is a results list area. The following information is displayed:

- Account Name
- Account Number
- Account Type
- Owning Group and Branch Number
- Account Street Address
- Account City
- Account State
- Account Zip Code
- Account Phone Number(s) – If the search was on Phone Number, then this will display the match with the search criteria, whether Home Work or Other phone number. In all other circumstances, the work phone number should be displayed.

The users would like to have the ability to sort the columns in both ascending and descending order. This will sort the entire result set. When a column is selected to sort, all other default or secondary sort criteria is abandoned. The manner in which Oracle sorts ascending and descending values will be used. The display area will position to the top of the entire result list based on the column selected to sort.

If the user selects an Account Name, the referral source panel will be presented with the appropriate information.

19.2 Validation

None identified at this time.

19.3 Business Exceptions

None identified at this time.

19.4 System Exceptions

None identified at this time.

20. Employee Search – Last Name Area

20.1 Behavior

This area will allow entry of alphanumeric values. The system will search on exact matches for values entered with an implied wild card at the end. Values in the Last Name area alone is valid to execute a search.

20.2 Validation

If no matches are found the message "0 record of 0 records were found". Or whatever the standard verbiage is displayed.

20.3 Business Exceptions

None identified at this time.

20.4 System Exceptions

None identified at this time.

21. Employee Search – First Name Area

21.1 Behavior

This area will allow entry of alphanumeric values. The system will search on exact matches for the values entered with an implied wild card at the end. This area will be disabled until a value has been entered into the Last Name Area.

21.2 Validation

None identified at this time.

21.3 Business Exceptions

If only the first name area has data, and a search command is executed, then a message will be presented to the user stating, "Must Specify a Last Name".

21.4 System Exceptions

None identified at this time.

22. Employee Search – Display Area

22.1 Behavior

The result display will initially be blank on first presentation of the panel and until at least one search is executed and at least one record is found that matches the search criteria.

This is a results list area. The following information is displayed:

- Employee Name
- Employee Number
- Group and Branch Number
- Group and Branch Description
- Department
- Title

Since the Employee data is coming from a tuxedo call, the user will not be allowed the ability to sort on a column in the search results.
If the user selects an Employee Name, the referral source panel will be presented with the appropriate information.

22.2 Validation

None identified at this time.

22.3 Business Exceptions

None identified at this time.

22.4 System Exceptions

None identified at this time.

23. Search, Reset and Cancel Button Line Area

23.1 Behavior

The Search image/button will invoke the search process, submitting the form to the server.

The Reset image/button will clear out the all of the search criteria data areas and reset the panel to the initial values.

The Cancel image/button will take the user to the last panel accessed.

23.2 Validation

None identified at this time.

23.3 Business Exceptions

None identified at this time.

23.4 System Exceptions

None identified at this time.

24. Print Current Page and Print All Records Button Line Area

24.1 Behavior

The Print Current Page image/button will print the information currently displayed on the panel.
The Print All Records image/button will print the information in the entire result set list.

24.2 Validation

None identified at this time.

24.3 Business Exceptions

None identified at this time.

24.4 System Exceptions

None identified at this time.

25. Add New Contact – Last Name Area

25.1 Behavior

This area will allow entry of alphanumeric values.

25.2 Validation

None identified at this time.

25.3 Business Exceptions

None identified at this time

25.4 System Exceptions

None identified at this time.

26. Add New Contact – First Name Area

26.1 Behavior

This area will allow entry of alphanumeric values.

26.2 Validation

None identified at this time.

26.3 Business Exceptions

None identified at this time

26.4 System Exceptions

None identified at this time.

27. Ok and Cancel Button Area

27.1 Behavior

The "Ok" image/button will attempt to add the information entered to the database, invoking the appropriated edit criteria.

The Cancel image/button will take the user to the last panel accessed .

27.2 Validation

If the user hits the "Ok" button and there is no data in either the Last Name and/or First Name fields, the system will display an error message that says "Must enter a First Name and/or Last Name."

27.3 Business Exceptions

None identified at this time.

27.4 System Exceptions

None identified at this time.

28. Security

The user must have the appropriate security level to access these screens. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

ECARS 2.0
Screen Action Specification: Transfer Reservation

Version 1.5

Revision History

Date	Version	Description	Author
August 28, 2001	1.0	Creation	Leanne Bevelhimer
September 17, 2001	1.1	Updated cancel button specifications	Leanne Bevelhimer
October 2, 2001	1.2	Updated based on technical constraints of pop-up windows	Leanne Bevelhimer
October 3, 2001	1.3	Added screen shot of Reservation Pilot version.	James Atteberry
November 1, 2001	1.4	Updated based on it being a full screen	Leanne Bevelhimer
November 9, 2001	1.5	Updated screen shots	Leanne Waugh

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Screen Action Specification

1. Introduction

This document describes the behavioral characteristics associated with the Transfer Reservation screen, and its related screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Screen Shots

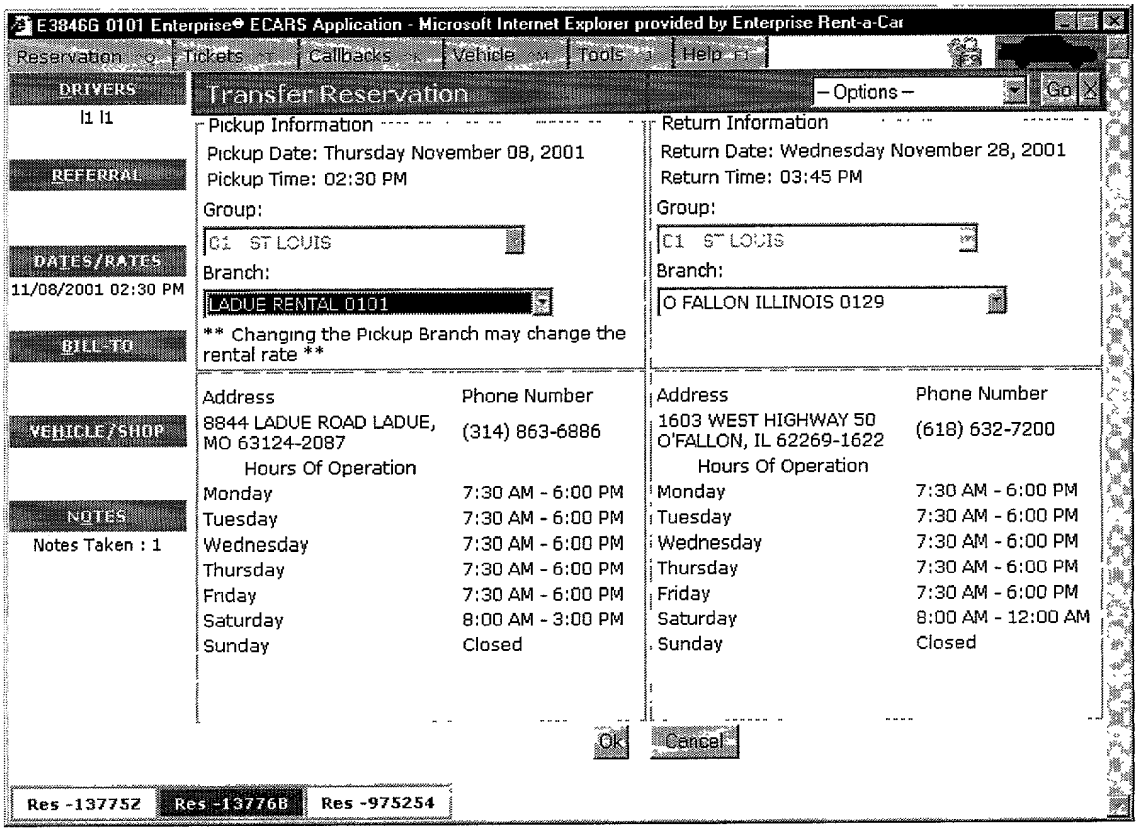

Figure 1: Transfer Reservation (Reservation Pilot Version)

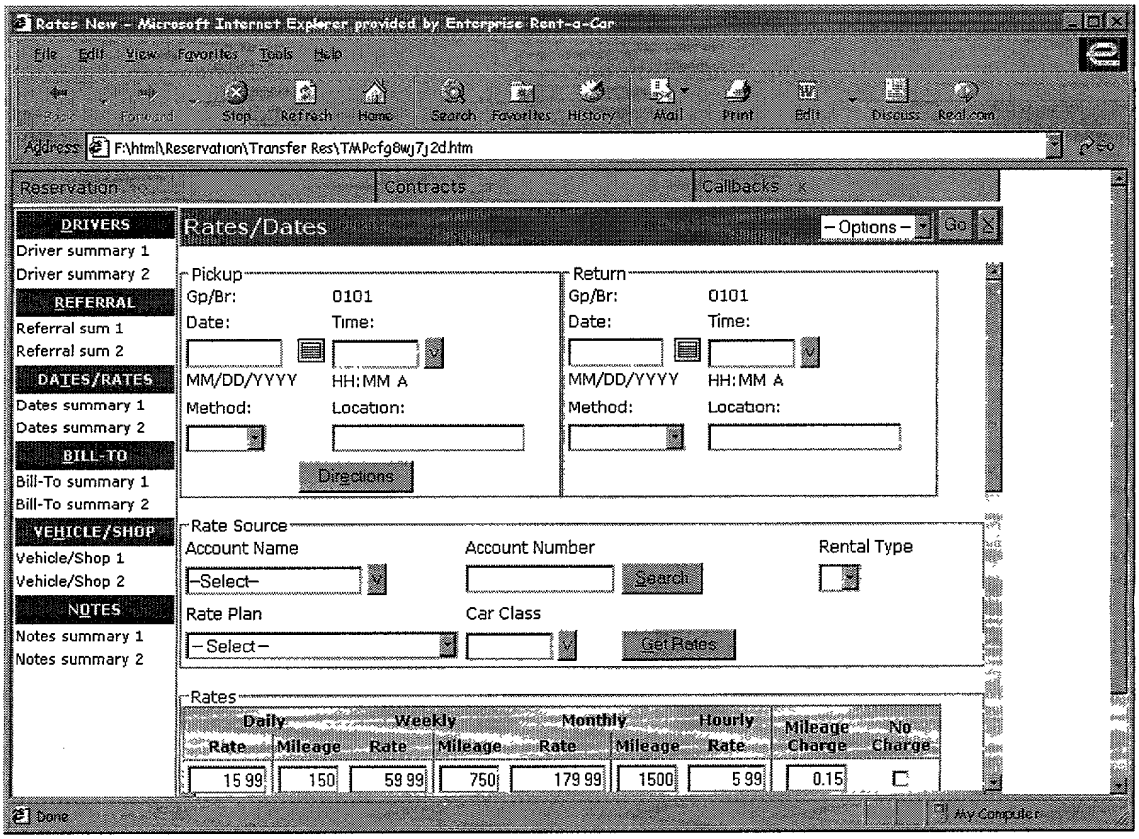

Figure 2: Dates and Rates (with Pick-Up and Return Group/Branch Information)

3. Field Descriptions

3.1 Transfer Reservation Main Page

3.1.1 Pick-Up Date

3.1.1.1 Behavior

This field is a read-only text field that displays the date of the reservation pick-up. The format of the date is such that the user is aware of the day of the week that the pick-up is to occur, for example, Tuesday, August 28, 2001. The actual format of the date is specific to the location of the branch.

If a pick-up date is not entered in the reservation, this field will be blank.

3.1.1.2 Validation

None identified at this time.

3.1.1.3 Business Exceptions

None identified at this time.

3.1.1.4 System Exceptions

None identified at this time.

3.1.2 Pick-Up Time

3.1.2.1 Behavior

This field is a read-only text field that displays the reservation pick-up time. The format of the time is specific to the location that the branch is in. For 12-hour locales, it is HH:MM A and for 24-hour locales, it is HH:MM.

If a pick-up time is not entered in the reservation, this field will be blank.

3.1.2.2 Validation

None identified at this time.

3.1.2.3 Business Exceptions

None identified at this time.

3.1.2.4 System Exceptions

None identified at this time.

3.1.3 Return Date

3.1.3.1 Behavior

This field is a read-only text field that displays the return date. The date is displayed in a format so that the user is aware of the day of the week that the pick-up is to occur, for example, Tuesday, August 28, 2001. The actual format of the date is specific to the location of the branch.

If a return date is not entered in the reservation, this field will be blank .

3.1.3.2 Validation

None identified at this time.

3.1.3.3 Business Exceptions

None identified at this time.

3.1.3.4 System Exceptions

None identified at this time.

3.1.4 Return Time

3.1.4.1 Behavior

This field is a read-only text field that displays the reservation return time. The format of the time is specific to the location that the branch is in. For 12-hour locales, it is HH:MM A and for 24-hour locales, it is HH:MM.

If a return time is not entered in the reservation, this field will be blank.

3.1.4.2 Validation

None identified at this time.

3.1.4.3 Business Exceptions

None identified at this time.

3.1.4.4 System Exceptions

None identified at this time.

3.1.5 Pick-Up Group

3.1.5.1 Behavior

This field area is a drop down box, limited to those groups that exist at the point in time that the screen is opened. The user will be able to type a character, alpha or numeric, into the area and have the drop down list position to the character. For example, if the user types an 'H' the drop down list would position to the first string beginning with 'H'. The default item will be the group associated to the terminal locale or the currently saved pick-up group.

3.1.5.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. For the purposes of Pilot Reservation, the group drop-down box will be disabled. For full release, the field will be enabled based on security roles. When the Transfer Reservation screen is initially opened on a new reservation, the pick-up group field will default to the terminal's group. When the Transfer Reservation screen is initially opened for a previously saved reservation, the pick-up group field will default to the location that was saved with the reservation.

3.1.5.3 Business Exceptions

None identified at this time.

3.1.5.4 System Exceptions

None identified at this time.

3.1.6 Pick-Up Branch

3.1.6.1 Behavior

This field area is a drop down box, limited to those rental branches that exist at the point in time that the screen is opened in the group that is selected in the Pick-Up Group field. The user will be able to type a character, alpha or numeric, into the area and have the drop down list position to the character. For example, if the user types an 'H' the drop down list would position to the first string beginning with 'H'. The default item will be the branch associated to the terminal locale or the currently saved pick-up branch.

3.1.6.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. When the Transfer Reservation screen is initially opened on a new reservation, the pick-up branch field will default to the terminal's group. When the Transfer Reservation screen is initially opened for a previously saved reservation, the pick-up branch field will default to the location that was saved with the reservation.

3.1.6.3 Business Exceptions

None identified at this time.

3.1.6.4 System Exceptions

None identified at this time.

3.1.7 Return Group

3.1.7.1 Behavior

This field area is a drop down box, limited to those groups that exist at the point in time that the screen is opened. The user will be able to type a character, alpha or numeric, into the area and have the drop down list position to the character. For example, if the user types an 'H' the drop down list would position to the first string beginning with 'H'. The default item will be the group associated to the terminal locale or the currently saved return group.

3.1.7.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. For the purposes of Pilot Reservation, the group drop-down box will be disabled. For full release, the field will be enabled based on security roles. When the Transfer Reservation screen is initially opened on a new reservation, the pick-up group field will default to the terminal's group. When the Transfer Reservation screen is initially opened for a previously saved reservation, the return group field will default to the location that was saved with the reservation.

3.1.7.3 Business Exceptions

None identified at this time.

3.1.7.4 System Exceptions

None identified at this time.

3.1.8 Return Branch

3.1.8.1 Behavior

This field area is a drop down box, limited to those rental branches that exist at the point in time that the screen is opened in the group that is selected in the Return Group field. The user will be able to type a character, alpha or numeric, into the area and have the drop down list position to the character. For example, if the user types an 'H' the drop down list would position to the first string beginning with 'H'. The default item will be the branch associated to the terminal locale or the currently saved pick-up branch.

When the user selects a new Pick-Up Branch, the Return Branch field automatically changes to the same branch.

3.1.8.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. When the Transfer Reservation screen is initially opened on a new reservation, the pick-up branch field will default to the terminal's group. When the Transfer Reservation screen is initially opened for a previously saved reservation, the return branch field will default to the location that was saved with the reservation.

3.1.8.3 Business Exceptions

None identified at this time.

3.1.8.4 System Exceptions

None identified at this time.

3.1.9 Rental Rates Note

3.1.9.1 Behavior

This field is a read-only label that displays an alert to the user. It always appears on the screen to notify the user that changing the pick-up location may change the quoted rental rates.

3.1.9.2 Validation

None identified at this time.

3.1.9.3 Business Exceptions

None identified at this time.

3.1.9.4 System Exceptions

None identified at this time.

3.1.10 Pick-Up Branch Availability Note

3.1.10.1 Behavior

This field is a read-only label that notifies the user if the selected pick-up branch is not open. It is displayed above the selected branch address, if applicable.

If the user selects a pick-up branch that is not open for the entered pick-up time then, a note will appear in red text that states, "The pick-up location is closed during selected hours".

If the pick-up date and time are not entered, then the message will not appear. If the pick-up date is entered without the time, the message will only appear if the branch is closed for the entire selected day.

3.1.10.2 Validation

None identified at this time.

3.1.10.3 Business Exceptions

None identified at this time.

3.1.10.4 System Exceptions

None identified at this time.

3.1.11 Return Branch Availability Note

3.1.11.1 Behavior

This field is a read-only label that notifies the user if the selected return branch is not open. It is displayed above the selected branch address, if applicable.

If the user selects a return branch that is not open for the entered return time then, a note will appear in red text that states "The return location is closed during selected hours".

If the return date and time are not entered, then the message will not appear. If the return date is entered without the time, the message will only appear if the branch is closed for the entire selected day.

3.1.11.2 Validation

None identified at this time.

3.1.11.3 Business Exceptions

None identified at this time.

3.1.11.4 System Exceptions

None identified at this time.

3.1.12 Pick-Up Branch Address

3.1.12.1 Behavior

The Pick-Up Branch address is a read-only label that is based upon the Pick-Up Group/Branch combination that is selected. It is not visible when the screen is first opened. When the user selects a new Pick-Up Branch, this field will automatically update with the selected Pick-Up Branch's address.

3.1.12.2 Validation

None identified at this time.

3.1.12.3 Business Exceptions

None identified at this time.

3.1.12.4 System Exceptions

None identified at this time.

3.1.13 Pick-Up Branch Phone Number

3.1.13.1 Behavior

The Pick-Up Branch phone number is a read-only label that is based upon the Pick-Up Group/Branch combination that is selected. It is not visible when the screen is first opened. When the user selects a new Pick-Up Branch, this field will automatically update with the selected Pick-Up Branch's phone number.

3.1.13.2 Validation

None identified at this time.

3.1.13.3 Business Exceptions

None identified at this time.

3.1.13.4 System Exceptions

None identified at this time.

3.1.14 Pick-Up Branch Hours of Operation

3.1.14.1 Behavior

The Pick-Up Branch hours of operation field is a read-only label that is based upon the Pick-Up Group/Branch combination that is selected. It is not visible when the screen is first opened. When the user selects a new Pick-Up Branch, this field will automatically update with the selected Pick-Up Branch's hours of operation. The hours of operation are displayed in the time local to the selected branch.

3.1.14.2 Validation

None identified at this time.

3.1.14.3 Business Exceptions

None identified at this time.

3.1.14.4 System Exceptions

None identified at this time.

3.1.15 Return Branch Address

3.1.15.1 Behavior

The Return Branch address is a read-only label that is based upon the Return Group/Branch combination that is selected. It is not visible when the screen is first opened. When the user selects a new Return Branch or the Return Branch is changed, this field will automatically update with the selected Return Branch's address.

3.1.15.2 Validation

None identified at this time.

3.1.15.3 Business Exceptions

None identified at this time.

3.1.15.4 System Exceptions

None identified at this time.

3.1.16 Return Branch Phone Number

3.1.16.1 Behavior

The Return Branch phone number is a read-only label that is based upon the Return Group/Branch combination that is selected. It is not visible when the screen is first opened. When the user selects a new Return Branch or the Return Branch is changed, this field will automatically update with the selected Return Branch's phone number.

3.1.16.2 Validation

None identified at this time.

3.1.16.3 Business Exceptions

None identified at this time.

3.1.16.4 System Exceptions

None identified at this time.

3.1.17 Return Branch Hours of Operation

3.1.17.1 Behavior

The Return Branch hours of operation field is a read-only label that is based upon the Return Group/Branch combination that is selected. When the user selects a new Return Branch or the Return Branch is changed, this field will automatically update with the selected Return Branch's hours of operation. The hours of operation are displayed in the time local to the selected branch.

3.1.17.2 Validation

None identified at this time.

3.1.17.3 Business Exceptions

None identified at this time.

3.1.17.4 System Exceptions

None identified at this time.

3.1.18 OK Button

3.1.18.1 Behavior

When the user presses the 'OK' button, the system stores the data on the screen, creates a system generated note and returns the user to the main screen of the navigation area that the user was in before navigating to Transfer Reservation Screen.

3.1.18.2 Validation

None identified at this time.

3.1.18.3 Business Exceptions

None identified at this time.

3.1.18.4 System Exceptions

None identified at this time.

3.1.19 Cancel Button

3.1.19.1 Behavior

When the user clicks the 'Cancel' button, the system does not store the data and returns the user to the main screen

of the navigation area that the user was in before navigating to the Transfer Reservation Screen..

3.1.19.2 Validation

None identified at this time.

3.1.19.3 Business Exceptions

None identified at this time.

3.1.19.4 System Exceptions

None identified at this time.

3.2 Dates and Rates Screen

3.2.1 Pick-Up Group/Branch

3.2.1.1 Behavior

This is a read-only text field that displays the current pick-up group/branch numbers. For a new reservation, it will display the group/branch information for the terminal location. For an existing reservation, it will display the group/branch information that is stored with the reservation. After the user saves information on the Transfer Reservation page and closes the Transfer Reservation screen, this field will update with the new information.

3.2.1.2 Validation

None identified at this time.

3.2.1.3 Business Exceptions

None identified at this time.

3.2.1.4 System Exceptions

None identified at this time.

3.2.2 Return Group/Branch

3.2.2.1 Behavior

This is a read-only text field that displays the current return group/branch numbers. For a new reservation, it will display the group/branch information for the terminal location. For an existing reservation, it will display the group/branch information that is stored with the reservation. After the user saves information on the Transfer Reservation page and closes the Transfer Reservation screen, this field will update with the new information.

3.2.2.2 Validation

None identified at this time.

3.2.2.3 Business Exceptions

None identified at this time.

3.2.2.4 System Exceptions

None identified at this time.

4. Rules

- A System Generated Note is generated every time a location is changed and the reservation is completed The system generated note is not saved to the reservation until the reservation has been completed.
- Transfer Reservation data is only saved to the reservation if all the changes to the reservations are saved.
- The user has the option to transfer any reservation in his/her group.
- The option to transfer a reservation is found in the 'Options' drop down list from within a reservation.
- This screen will not be available for NatRes Reservations.

- When a pick-up/return location is changed to a location in a different time zone, the reservation time changes so that it is the same in the new time zone. The database value (GMT) will be changed, but the value displayed to the user will be the same. Example: A person has a reservation at 4:00 PM (CST) in St. Louis and it is transferred to New York, the reservation will now be at 4:00 PM (EST).
- When the pick-up branch is changed and the reservation is completed, the reservation will print at the new pick-up location.
- The Transfer Reservation Screen is a full screen window. It will behave like other full screens in the application.
- When the user navigates away from the window via the left hand navigation bar, the system will not store any changes that the user made on the Transfer Reservation screen.

5. Security

- The security for Transfer Reservation is based upon the Reservation security model. If the user has permissions to edit a reservation, he/she will be able to transfer it. In general, all users in a group can modify all reservations for that group.

6. Questions

- If a user transfers a reservation to another time zone, what will happen to the pick-up/return time? For example, if a person has a reservation at 4:00 PM in St. Louis and it is transferred to New York, what time will the reservation be for (4:00 or 5:00)? *The pick-up/return time will be the same.*
- Should everyone in a given branch have permissions to change the location for every other branch in that group? *Yes*

1. System Generated Notes

1.1 How a note will be created and displayed

Based on the events that will be explained in the following table, this is how the system will save and display system notes

- When the user navigates from a screen (submits a page) either during creation or edit, the system will determine whether any notes need to be generated.
- The system will hold onto all the notes generated by the user until the user chooses to save or complete the reservation/ticket.
- After the user has saved or completed the reservation/ticket, the user can display the generated notes by either navigating to the notes area or re-opening the reservation/ticket and navigating to the notes area . (Note will be available in all sub-applications)

(NOTE: This document does not address ARMS messaging notes.)

1.1.1 Technical Notes

- Design must support system notes having a type that can be queried for reporting purposes .
- No notes will be retrieved to the session until the user has navigated to the notes area .
- The word "changed" includes adding a value "null to something", changing a value "something to something different" or deleting a value "something to null" .
- Whenever a system generated note is created by a user, the system will store :
  - The name of the user that created the note
  - Date stamp when the event occurred
  - Time stamp when the event occurred

The system should store all system-generated notes in the local language that is used by that terminal's physical location .

1.1.2 Question

1. Should the European notes be stored and displayed in the local language or English?
   Answer: All notes will be stored in the local language of the physical terminal being used.

Event	Note Text	When to generate in Reservation	When to generate in Open	Use Case/Screen
A Reservation becomes an open ticket after the reservation has already been created.	"Ticket Opened"		Create	Open
A new ticket it is created	"Ticket Opened"		Create	Open
When a ticket is opened, the information in the preference field will be generated as a note	Any text within the preference field		Create	Open
When a ticket is opened, the text in the field, vehicle notes, will be generated as a note	Text in the field "Vehicle Notes"		Create	Open
A reservation is matched or unmatched to a Ticket	Reservation # "XXXXXX" was (un) matched to Ticket # "XXXXXX".		Create/Edit	Open
A reservation is created	"Reservation Created"	Create		Create
The user marks the ARMS Status Dialog Box as "Renter Has Been Contacted"	"Renter Has Been Contacted" AND any text entered in the ARMS Notes field	Edit		Navigation/ARMS Dialog Box
The user marks the ARMS Status Dialog Box as "Renter Has Not Been Contacted"	"Renter Has Been Contacted" AND any text entered in the ARMS Notes field	Edit		Navigation/ARMS Dialog Box
The Reservation Pick-up date is changed	Pick-up Date "XX/XX/XXXX" was changed to "XX/XX/XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Reservation Pick-up time is changed	Pick-up Time "XX: XX" was changed to "XX: XX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Reservation pick-up method is changed	Pick-up Method "XX" was changed to "XX".	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Reservation pick-up location is changed	Pick-up Location "XXXX" was changed to "XXXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Reservation Return date is changed	Return Date "XX/XX/XXXX" was changed to "XX/XX/XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Reservation Return time is changed	Return Time "XX: XX" was changed to "XX: XX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Reservation return method is changed	Return Method "XX" was changed to "XX".	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Rate Source and/or Account Number are changed	Rate Source "XXXXX" was changed to "XXXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Rental Type is changed	Rental Type "XXXX" was changed to "XXXX"	Edit	Create (if selected in the Reservation) /Edit	Rates/Dates
The Car Class is changed	Car Class "XXXX" was changed to	Edit	Create (if selected in the	Rates/Dates

Event	Note Text	When to generate in Reservation	When to generate in Open Reservation	Use Case/Screen
	"XXXX"		Reservation) /Edit	
After a rate source and car class has been chosen, the user manually changes any of the values populated in the vehicle rate table.	What rate values were changed and what the old and new values are.	Create/Edit	Create/Edit	Rates/Dates
The Reservation return location is changed	Return Location "XXXX" was changed to "XXXXX"	Edit	Create (if selected in the Reservation) /Edit	Pick-up Location
The Group or Branch of the Reservation pick-up location is changed	Pick-up Location "GPBR" was changed to "GPBR"	Edit	Create (if selected in the Reservation) /Edit	Pick-up Location
The Group or Branch of the Reservation return location is changed	Return Location "GPBR" was changed to "GPBR"	Edit	Create (if selected in the Reservation) /Edit	Pick-up Location
The system has populated the products area after a rate source has been chosen and the user manually changes any of the values.	What values were changed and what the old and new values are.	Create/Edit	Create/Edit	Products and Discounts
The user changes a tax or surcharge.	What values were changed and what the old and new values are.	Create/Edit	Create/Edit	Tax
The user changes the tax-exempt status.	Tax Exempt Status "XXXX" was changed to "XXXX".	Create/Edit	Create/Edit	Tax/Driver
The user chooses to "Rent" when a renter comes up "Renter Warning"	"Renter Warning overridden"	Create/Edit	Create/Edit	Basic Res/Driver
The user chooses to bypass the warning when a driver's age is either over 70. 21-24 or 18-20 years of age.	"Underage/Overage warning overridden"	Create/Edit	Create/Edit	Basic Res/Driver
The User changes the Home phone number of the Renter.	Renter "Last Name, First name" Home Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver
The User changes the Work phone number of the Renter.	Renter "Last name, First name" Work Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver
The User changes the Other phone number of the Renter.	Renter "Last name, First Name" Other Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver
The User changes any Additional Driver's Home phone number.	Additional Driver "Last Name, First Name" Home Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver

Event	Note Text	When to generate in Reservation	When to generate in Open	Use Case/Screen
The User changes any Additional Driver's Work phone number.	Additional Driver "Last Name, First Name" Work Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver
The User changes any Additional Driver's Other phone number.	Additional Driver "Last Name, First Name" Other Phone was changed from "XXXX" to "XXXXX".	Create (if populated by Driver search)/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver
The User changes any renter or additional driver's first or last name	What values were changed and what the old and new values are	Create/Edit	Create/Edit	Basic Res/Driver
The user adds or deletes an additional driver	Driver "Last Name, First Name" was removed (added)	Create/Edit	Create (if data exists from the reservation) /Edit	Basic Res/Driver
The user changes the Referral Account	Referral Account "XXXXX" was changed to "XXXXXX"	Edit	Create (if data exists from the reservation) /Edit	Referral
The user changes the referral contact. (The referral account is the same)	Referral Contact "XXXX" was changed to "XXXX" for Referral Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Referral
The user adds a "not on file" contact	Not on File Contact "First Name, Last Name" was added for Referral Account "XXXXX".	Create/Edit	Create/Edit	Referral
The user changes any bill-to account.	Bill-to "XXXX" was changed to "XXXX".	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user adds or removes a bill-to account	Bill – to account "xxxxxx" was added/removed	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the bill-to contact. (The Bill-to account is the same)	Bill-To Contact "XXXXX" was changed to "XXXX" for Bill-to account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user adds a "not of file" bill-to contact.	Not on file contact "First Name Last Name" was added for Bill-to Account "XXXXX"	Create/Edit	Create/Edit	Bill-To
The user changes the authorized by contact. (The Bill-to account is the same)	Authorized By "XXXX" was changed to "XXXX" for Bill-to Account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the auth status. (The Bill-to account is the same)	The Authorization Status was changed from "XXX" to "XXXX" for Bill-to account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the auth %. (The Bill-to account is the same)	The Authorization % was changed from "XX" to "XX" for Bill-to Account	Edit	Create (if data exists from the reservation) /Edit	Bill-to

Event	Note Text	When to generate in Reservation	When to generate in Open	Use Case/Screen
	"XXXX"			
The user changes the Max Per day. (The Bill-to account is the same)	The Maximum Amount Per Day was changed from "XX" to "XX" for Bill-to Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the Max Billable Amount (The Bill-to account is the same)	The Maximum Billable Amount was changed from "XX" to "XX" for Bill-to Account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the number of days. (The Bill-to account is the same)	The number of days was changed from "XX" to "XX" for Bill-to Account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes either the Billing start date or billing start time (The Bill-to account is the same)	The Billing Start Date and Billing Start Time changed from "XXXXXX" to "XXXXXXXX' for Bill-to Account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes either the Billing end date or billing end time. (The Bill-to account is the same)	The Billing End Date and Billing End Time changed from "XXXXXX" to "XXXXXXXX' for Bill-to account "XXXXX".	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the daily rate. (The Bill-to account is the same)	The Daily Rate was changed from "XXXX" to "XXXX" for Bill-to account "XXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the Authorized Car Class. (The Bill-to is the same)	The Authorized Car Class was changed from "XXXX" to "XXXX" for Bill-to account "XXXXX".	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the authorization to include or not include tax (The Bill-to account is the same)	The authorization was changed to (not) include tax.	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes a product or service (The Bill-to is the same)	What Products were added or deleted and the amounts they were changed from and to.	Create/Edit	Create/Edit	Bill-to
The user adds a Not on File Bill-to	Not on File Account "XXXX" has been added as a Bill-to	Create/Edit	Create/Edit	Bill-to
The user changes the Ro/Po/Cl #. (The Bill-to is the same)	The Claim/ Pol/ PO/ RO# was changed from "XXXXX" to "XXXX" for Bill-to account "XXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to

Event	Note Text	When to generate in Reservation	When to generate in Open	Use Case/Screen
The user changes the Claim type. (The Bill-to is the same)	The Claim Type was changed from "XXXX" to "XXXX" for Bill-to account "XXXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user changes the insured's name.	The Insured's Name was changed from "XXXXXX" to "XXXXXX"	Edit	Create (if data exists from the reservation) /Edit	Bill-to
The user adds a "Not on File" Shop contact.	Not on file contact "First Name Last Name" was added for Account "XXXXX"	Create/Edit	Create (if data exists from the reservation) /Edit	Vehicle/Shop
The user changes the shop account.	Shop "XXXX" was changed to "XXXX".	Edit	Create (if data exists from the reservation) /Edit	Vehicle/Shop
The user changes the type of loss.	Type of loss "XXXX" was changed to "XXXX".	Edit	Create (if data exists from the reservation) /Edit	Vehicle/Shop
The user changes the "Total Loss?".	Total Loss "XXXX" was changed to "XXXX".	Edit	Create (if data exists from the reservation) /Edit	Vehicle/Shop
The user changes the date of loss.	Date of loss "XXXXXX" was changed to "XXXXXX".	Edit	Create (if data exists from the reservation) /Edit	Vehicle/Shop
The user changes number of theft waiver days.	Theft waiver days "X" was changed to "X"	Edit	Create (if data exists from the reservation) /Edit	Vehicle/Shop
The user changes the renter's vehicle Year.	"The renter's vehicle Year "XXXX" was changed to Year "XXXX"	Edit	Edit	Vehicle/Shop
The user changes the renter's vehicle Make.	"The renter's vehicle Make "XXXX" was changed to Make "XXXX"			
The user changes the renter's vehicle Model.	"The renter's vehicle Year "Model" was changed to Model "XXXX"			
The user changes the renter's vehicle Other Make text.	The renter's vehicle other Make "XXXX" was changed to "XXXX"	Edit	Edit	Vehicle/Shop
The user changes the renter's vehicle Other Model text.	The renter's vehicle other Model "XXXX" was changed to "XXXX"	Edit	Edit	Vehicle/Shop
The user changes the registration number of the renter's vehicle. (If the physical terminal location is in Europe.)	The renter's vehicle registration number "XXXX" was changed to "XXXX".	Edit	Edit	Vehicle/Shop
The user changes the class of the renter's vehicle. (If the physical terminal location is in Germany.)	The renter's vehicle class "X" was change to "X"	Edit	Edit	Vehicle/Shop
If the user voids a ticket	"Reservation was voided"	Edit	Edit	

<Company Name>

ECARS 2.0 - Driver
Screen Action Specification

Revision History

Date	Version	Description	Author
05/31/2001	1.0	Created Document	Mike Pallia
6/4/01	1.1	Revised Document	Johnny S. Johnston

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Driver screen.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Driver Screen

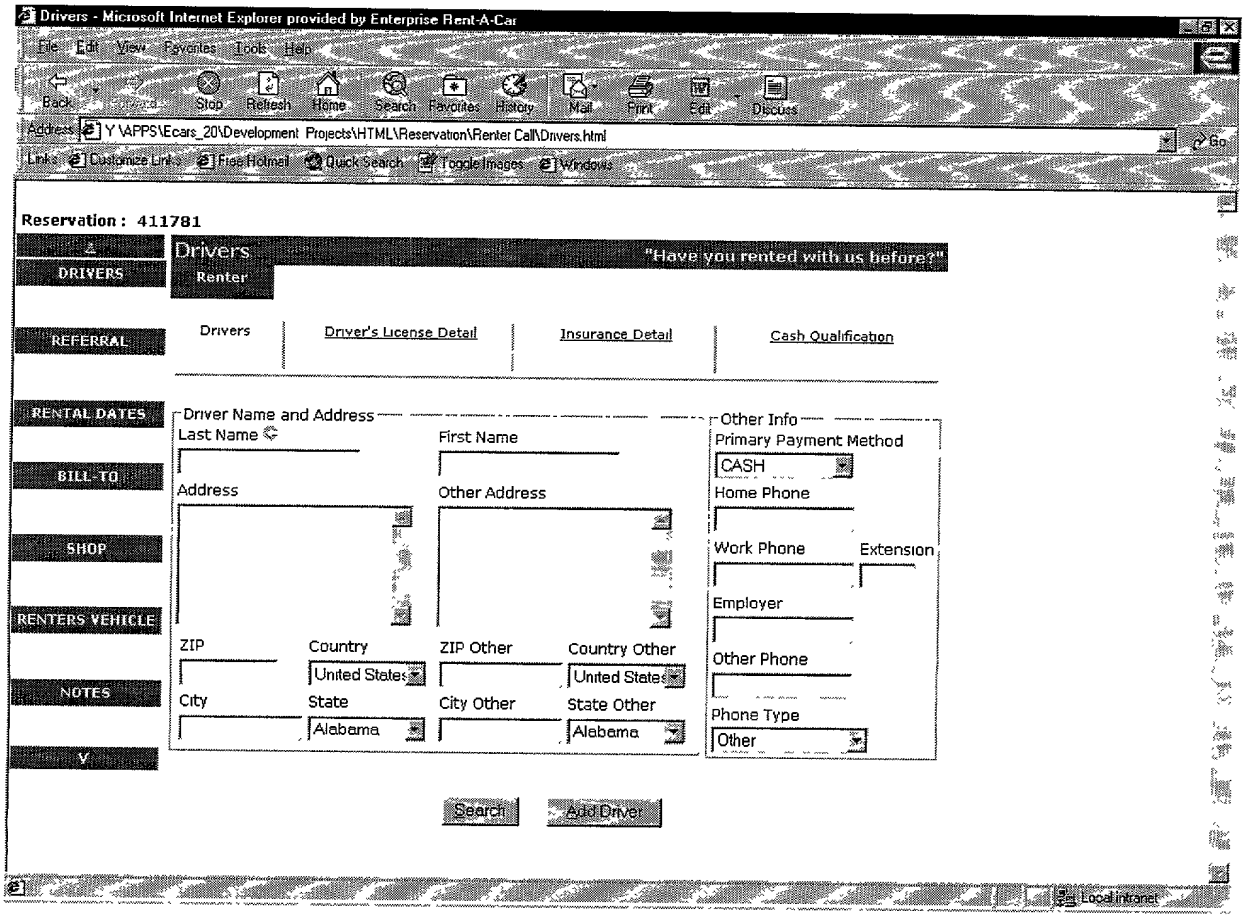

Figure 1 – Driver Screen

3. Reservation Number

3.1 Behavior

This area shows the unique reservation number that has been assigned to the newly created reservation. The reservation number is 6 alphanumeric characters long. If another reservation is open, its reservation number will be displayed in this area as well. The user will have the ability to have up to 3 reservations open at a time. A hyperlink will be available on the reservation numbers of the reservations that are NOT currently being displayed. For the reservation that is currently displayed, the reservation number will not have a hyperlink available. This is to allow the user to navigate between the open reservations.

3.2 Validation

None identified at this time.

3.3 Business Exceptions

If the user tries to open a 4th reservation, the system will display a message stating "A maximum of 3 reservations may be displayed".

3.4 System Exceptions

None identified at this time.

4. Driver Navigation Area

4.1 Behavior

This area gives the user the ability to move to any screen within the Driver area. Each screen within the Driver area is connected by a hyperlink. The screens that have been defined are: Driver, Driver's License Detail, Insurance Detail, and Cash Qualification. A hyperlink will NOT be available for the screen that is currently displayed.

4.2 Validation

None identified at this time.

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Driver's First and Last Name

5.1 Behavior

This area is divided into two fields.

- Last Name
- First Name.

Both fields are free form text fields and may contain alphanumeric values.

5.2 Validation

None identified at this time.

5.3 Business Exceptions

If the user attempts to exit the screen or complete the reservation, the last name field must have values entered. If there are not values in the last name field, the system will display a message "Last Name is required for a Reservation".

5.4 System Exceptions

None identified at this time.

6. Address and Other Address Area

6.1 Behavior

This area is broken into two free form text areas. The user has the ability to enter strings of alphanumeric values. The first area is called "Address" and the other area is called "Other Address".

6.2 Validation

None identified at this time.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. City, State, Zip Code and Country, and City Other, State Other, Zip Code Other and Country Other Areas

7.1 Behavior

These behaviors are detailed out in the Geo-Framework Search Screen Spec

7.2 Validation

None identified at this time.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Primary Payment Method Area

8.1 Behavior

This area is a drop down box that allows the user to select a Primary Payment Method. The valid values that are available within the drop-down list are: Cash, Credit Card, Debit Card, and Check. Upon initial entry to the screen, the value in the drop down should be defaulted to "Credit Card". The user can change the value by selecting another value from the drop down list. There is no blank or "other" option available.

8.2 Validation

None identified at this time.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time.

9. Home Phone Area

9.1 Behavior

The Home Phone area is a free form text area that will allow the user to input alphanumeric values.

9.2 Validation

None identified at this time.

9.3 Business Exceptions

None identified at this time.

9.4 System Exceptions

None identified at this time.

10. Work Phone Area

10.1 Behavior

The Work Phone area is a free form text area that will allow the user to input alphanumeric values.

10.2 Validation

None identified at this time.

10.3 Business Exceptions

None identified at this time.

10.4 System Exceptions

None identified at this time.

11. Phone Extension Area

11.1 Behavior

The Phone Extension area is a free form text area that will allow the user to input alphanumeric values. This area would not be enabled until there was a value entered into the Work Phone area.

11.2 Validation

There must be a value in the Work Phone area before this area is enabled.

11.3 Business Exceptions

None identified at this time.

11.4 System Exceptions

None identified at this time.

12. Employer Area

12.1 Behavior

The Employer area is a free form text area that will allow the user to input alphanumeric values.

12.2 Validation

None identified at this time.

12.3 Business Exceptions

None identified at this time.

12.4 System Exceptions

None identified at this time.

13. Other Phone Area

13.1 Behavior

The Other Phone area is a free form text area that will allow the user to input alphanumeric values.

13.2 Validation

None identified at this time.

13.3 Business Exceptions

None identified at this time.

13.4 System Exceptions

None identified at this time.

14. Phone Type Area

14.1 Behavior

This area will be a drop down area that upon default will be a blank. When the user clicks the drop down area, the system will display the domain of Phone Types available.

14.2 Validation

If there is a value entered in the Other Phone area, then a type other than blank must be selected.

14.3 Business Exceptions

If values exist within the Other Phone area, the system will also verify that a value, other than blank, has been selected from the drop down area Phone Type. If one has not been selected, the system displays a message "Phone Type must be selected".

14.4 System Exceptions

None identified at this time.

15. Button Line Area

15.1 Behavior

The Search image/button will invoke the search process, submitting the form to the server.
The Add Driver image/button will invoke the additional driver panel, submitting the form to the server.

15.2 Validation

None identified at this time.

15.3 Business Exceptions

None identified at this time.

15.4 System Exceptions

None identified at this time.

16. Rules

None identified at this time.

17. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

<Company Name>

Cash Qualification
Screen Action Specification

Revision History

Date	Version	Description	Author
04/12/2001	0.0	Created Template	Marty Tichy
04/16/2001	1.0	Created Document	Maribeth Concannon
06/18/2001	1.1	Updated screen shots & doc title	Marty Tichy
09/04/2001	1.2	Updated screenshots to reflect changes from Navigation use case.	James Atteberry
11/13/2001	1.3	Updated w/ current phone requirements.	James Atteberry

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8.1.1 Behavior **Error! Bookmark not defined.**
8.1.2 Validation **Error! Bookmark not defined.**
8.1.3 Business Exceptions **Error! Bookmark not defined.**
8.1.4 System Exceptions **Error! Bookmark not defined.**

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Insurance Details screen.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Screen Print

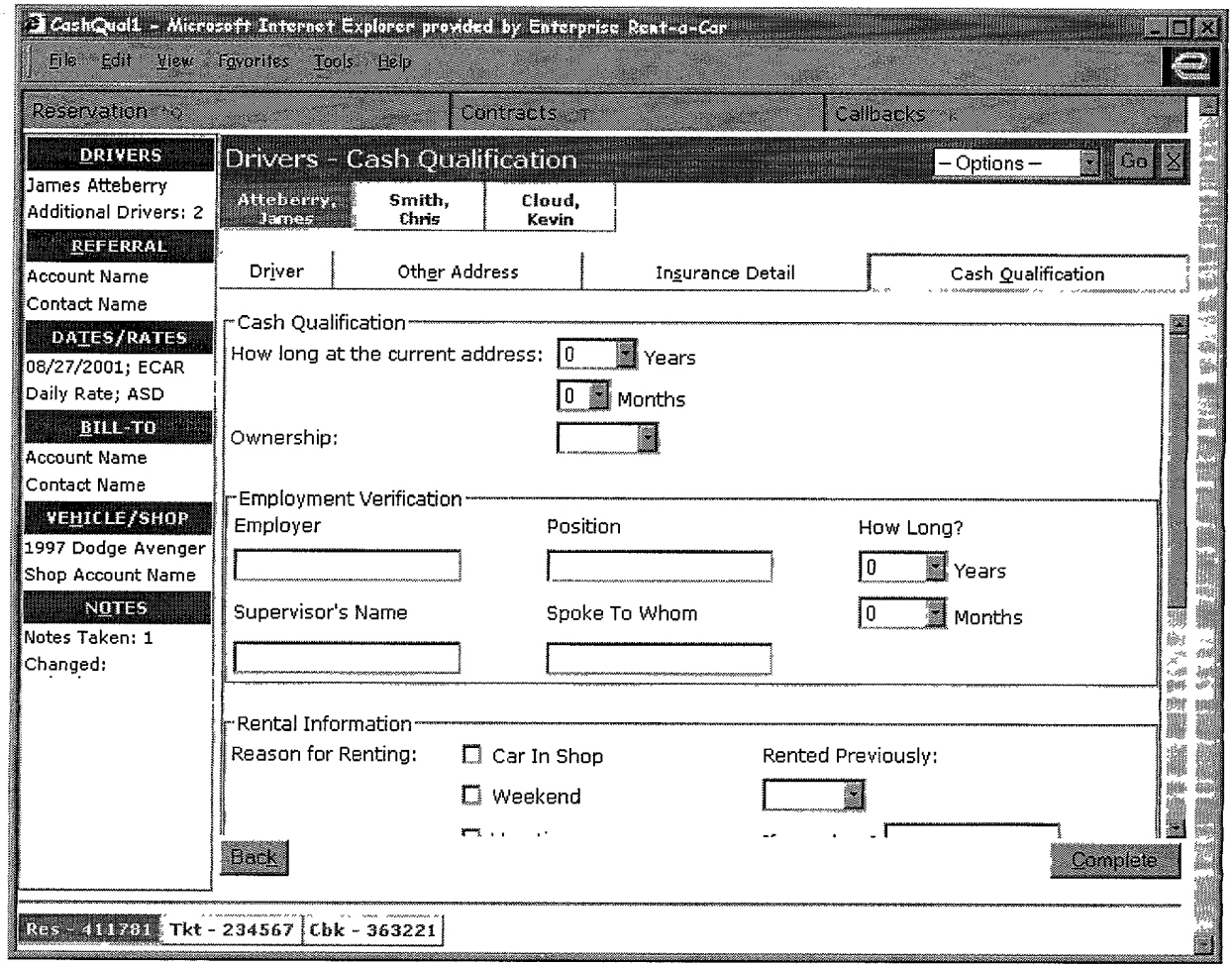

Figure1 - Cash Qualification Address & Employment Verification

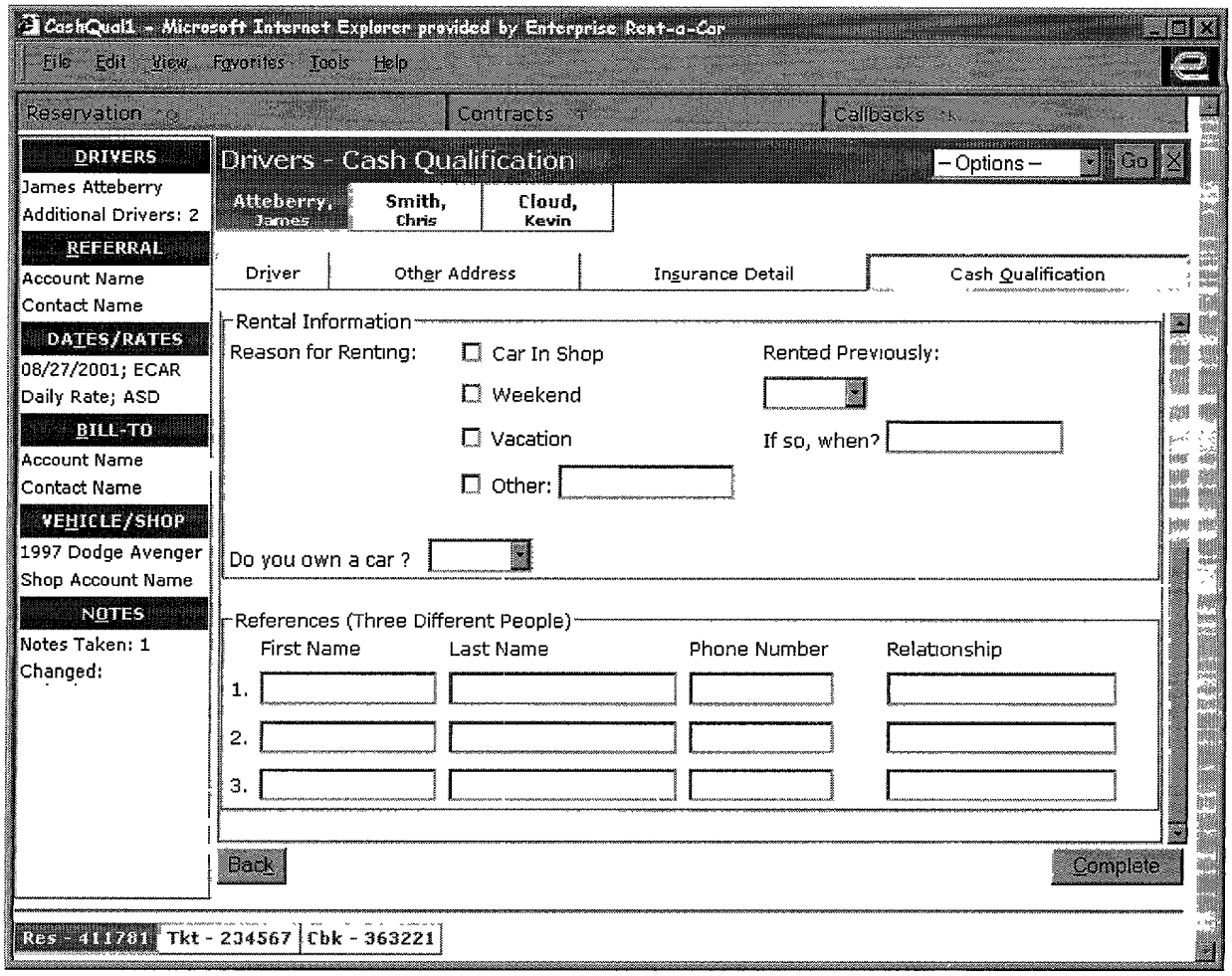

Figure 2 - Cash Qualification Rental Information

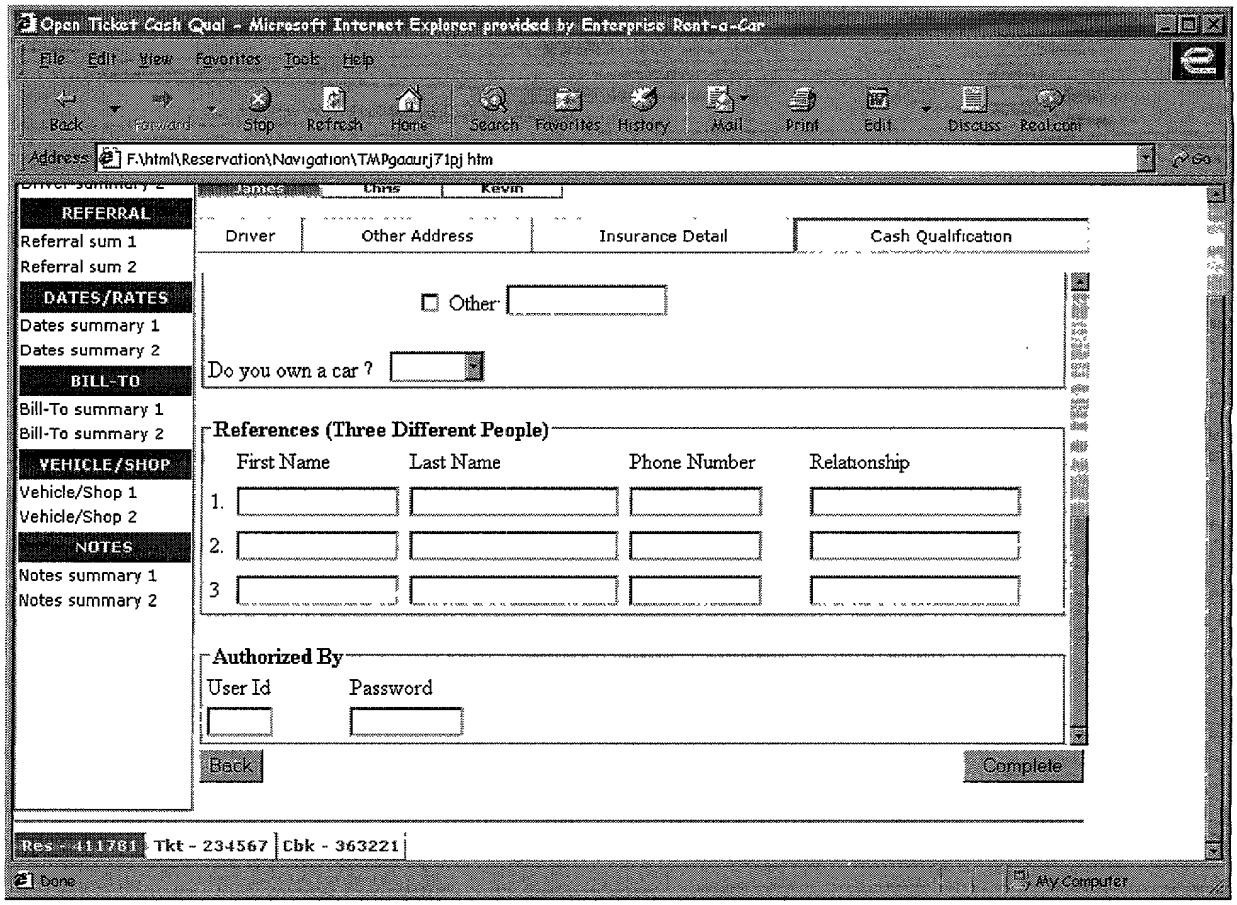

Figure 3 - Cash Qualification

3. Top (see Figure 1)

3.1 Years at current address

3.1.1 Behavior

This is a drop down list of integers and zero. The drop down should start at 0 and go through 9, followed by "10+".

3.1.2 Validation

No validation is necessary. The field is optional.

3.1.3 Business Exceptions

None have been identified at this time.

3.1.4 System Exceptions

None have been identified at this time.

3.2 Months at current address

3.2.1 Behavior

This is a drop down list of integers and zero. The drop down should start at 0 and go through 11.

3.2.2 Validation

No validation is necessary. The field is optional.

3.2.3 Business Exceptions

None have been identified at this time.

3.2.4 System Exceptions

None have been identified at this time.

3.3 Ownership

3.3.1 Behavior

This is a drop down list of two values (own & rent) plus a blank. Since the selection is optional, it should default to blank.

3.3.2 Validation

No validation is necessary. The field is optional.

3.3.3 Business Exceptions

None have been identified at this time.

3.3.4 System Exceptions

None have been identified at this time.

4. Employment Verification (see Figure 1)

4.1 Employer

4.1.1 Behavior

This is an alphanumeric field.

4.1.2 Validation

No validation is necessary. The field is optional.

4.1.3 Business Exceptions

None have been identified at this time.

4.1.4 System Exceptions

None have been identified at this time.

4.2 Position

4.2.1 Behavior

This is an alphanumeric field.

4.2.2 Validation

No validation is necessary. The field is optional.

4.2.3 Business Exceptions

None have been identified at this time.

4.2.4 System Exceptions

None have been identified at this time.

4.3 Supervisor's Name

4.3.1 Behavior

This is an alphanumeric field.

4.3.2 Validation

No validation is necessary. The field is optional.

4.3.3 Business Exceptions

None have been identified at this time.

4.3.4 System Exceptions

None have been identified at this time.

4.4 Spoke to Whom

4.4.1 Behavior

This is an alphanumeric field.

4.4.2 Validation

No validation is necessary. The field is optional.

4.4.3 Business Exceptions

None have been identified at this time.

4.4.4 System Exceptions

None have been identified at this time.

4.5 Years at Employer

4.5.1 Behavior

This is a drop down list of integers and zero. The drop down should start at 0 and go through 9, followed by "10+".

4.5.2 Validation

No validation is necessary. The field is optional.

4.5.3 Business Exceptions

None have been identified at this time.

4.5.4 System Exceptions

None have been identified at this time.

4.6 Months at Employer

4.6.1 Behavior

This is a drop down list of integers and zero. The drop down should start at 0 and go through 11.

4.6.2 Validation

No validation is necessary. The field is optional.

4.6.3 Business Exceptions

None have been identified at this time.

4.6.4 System Exceptions

None have been identified at this time.

5. Rental Information (see Figure 2)

5.1 Reason for Renting

5.1.1 Behavior

This is a choice among four values: Car in Shop, Weekend, Vacation, and Other. Since the selection is optional, it should default to nothing selected.

5.1.2 Validation

The selection and description are optional.

If Other is selected, then the field next to it is enabled to allow a description. The description is not required.

5.1.3 *Business Exceptions*

None have been identified at this time.

5.1.4 *System Exceptions*

None have been identified at this time.

5.2 Rented Previously

5.2.1 *Behavior*

This is a drop down of two values (yes & no) and a blank. Since the selection is optional, it should default to blank.

5.2.2 *Validation*

The selection and description are optional.

5.2.3 *Business Exceptions*

None have been identified at this time.

5.2.4 *System Exceptions*

None have been identified at this time.

5.3 If so, when?

5.3.1 *Behavior*

This is an alphanumeric field. If the answer to "Rented Previously" is Yes, then this field is enabled to allow an answer. The answer is not required.

5.3.2 *Validation*

The selection and description are optional.

5.3.3 *Business Exceptions*

None have been identified at this time.

5.3.4 *System Exceptions*

None have been identified at this time.

5.4 Do you own a car?

5.4.1 *Behavior*

This is a drop down of two values (Yes & No) and a blank. Since the selection is optional, it should default to blank.

5.4.2 *Validation*

The selection is optional.

5.4.3 *Business Exceptions*

None have been identified at this time.

5.4.4 System Exceptions

None have been identified at this time.

6. References (see Figure 2)

This section is not a dynamic list but rather a set of 3 names and associated information (below) which can be entered by the user.

6.1 First Name (column)

6.1.1 Behavior

This is an alphanumeric field.

6.1.2 Validation

No validation is necessary. The field is optional.

6.1.3 Business Exceptions

None have been identified at this time.

6.1.4 System Exceptions

None have been identified at this time.

6.2 Last Name (column)

6.2.1 Behavior

This is an alphanumeric field.

6.2.2 Validation

No validation is necessary. The field is optional.

6.2.3 Business Exceptions

None have been identified at this time.

6.2.4 System Exceptions

None have been identified at this time.

6.3 Phone Number (column)

Behavior

This is an alphanumeric field. There are currently no validations to be performed on this field. (06/05/2001- To date, no European considerations have been noted (waiting on update to Use Case).

6.3.1 Validation

None have been identified at this time.

6.3.2 Business Exceptions

None have been identified at this time.

6.3.3 *System Exceptions*

None have been identified at this time.

6.4 Relationship (column)

6.4.1 *Behavior*

This is an alphanumeric field.

6.4.2 *Validation*

No validation is necessary. The field is optional.

6.4.3 *Business Exceptions*

None have been identified at this time.

6.4.4 *System Exceptions*

None have been identified at this time.

7. Authorized By

7.1 User ID

7.1.1 *Behavior*

This is an alphanumeric field and should conform to the standards for User ID.

7.1.2 *Validation*

Must be a valid employee, authorized to the Rental Application.

7.1.3 *Business Exceptions*

None have been identified at this time.

7.1.4 *System Exceptions*

None have been identified at this time.

7.2 Password

7.2.1 *Behavior*

This is an alphanumeric field and should conform to the standards for Passwords.

7.2.2 *Validation*

Must be the employee's password.

7.2.3 *Business Exceptions*

None have been identified at this time.

7.2.4 *System Exceptions*

None have been identified at this time.

8. Button Line Area

8.1 Back Button

8.1.1 Behavior

The Back button will take the user to the main Driver screen for the currently selected Driver.

8.1.2 Validation

None identified at this time.

8.1.3 Business Exceptions

None identified at this time.

8.1.4 System Exceptions

None identified at this time.

8.2 Complete button

8.2.1 Behavior

The Complete button will initiate a save of the transaction. All validations will be performed, returning any errors to the user. If there are no errors, the transaction is saved, and the user is returned to the Reservation home page.

8.2.2 Validation

None identified at this time.

8.2.3 Business Exceptions

None identified at this time.

8.2.4 System Exceptions

None identified at this time.

9. Note for OPEN (vs. Reservation)

Password and employee ID will be added at the bottom for authentication of the person authorizing the Cash Qualification.

10. Rules

10.1 Required Fields

There are no required fields .

10.2 Tabbing

Tabbing between fields should be in the following order: Current Employer:

Position:

How long at current job: years

Supervisor's Name:

Spoke to Whom:

How long at current job: months

10.3 Saving

Because none of the information on the screen is required, the user can leave the screen at any time. The save is completed when the user saves the reservation or ticket.

11. Security

The user must have the appropriate security level to access this screen.

<Company Name>

ECARS 2.0 - Reservation Search Screen Action Specification

Revision History

Date	Version	Description	Author
04/20/2001	1.0	Created Document	Johnny S. Johnston
04/24/2001	1.1	Updated for final items and added panel prototypes	Johnny S. Johnston
09/04/2001	1.2	Updated to reflect changes from Navigation use case.	James Atteberry
10/03/2001	1.3	Added screen shot for Reservation Pilot version.	James Atteberry
11/08/2001	1.4	Added requirements that Group is disabled for Reservation Pilot, and that searching by res number will not go outside of group.	James Atteberry

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Screen Action Specification

1. Introduction

This document will describe the behavioral characteristics associated with the Reservation Search screen, and its related screens.

The system must be able to distinguish, presumably by the terminal ID, the proper screen language presentation as well as any field formatting applicable to that particular locale.

2. Simple Search

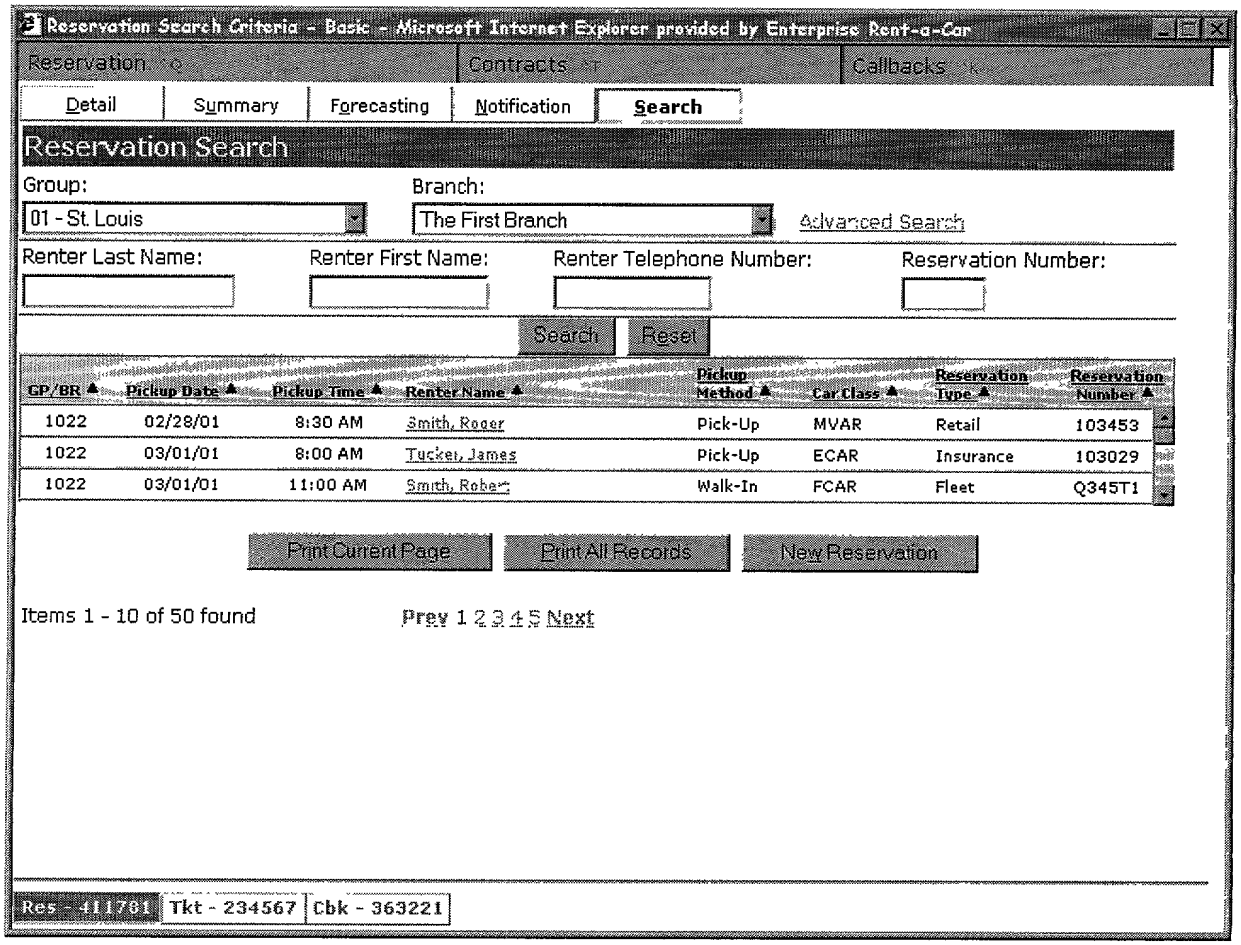

Figure 1 – Simple Search

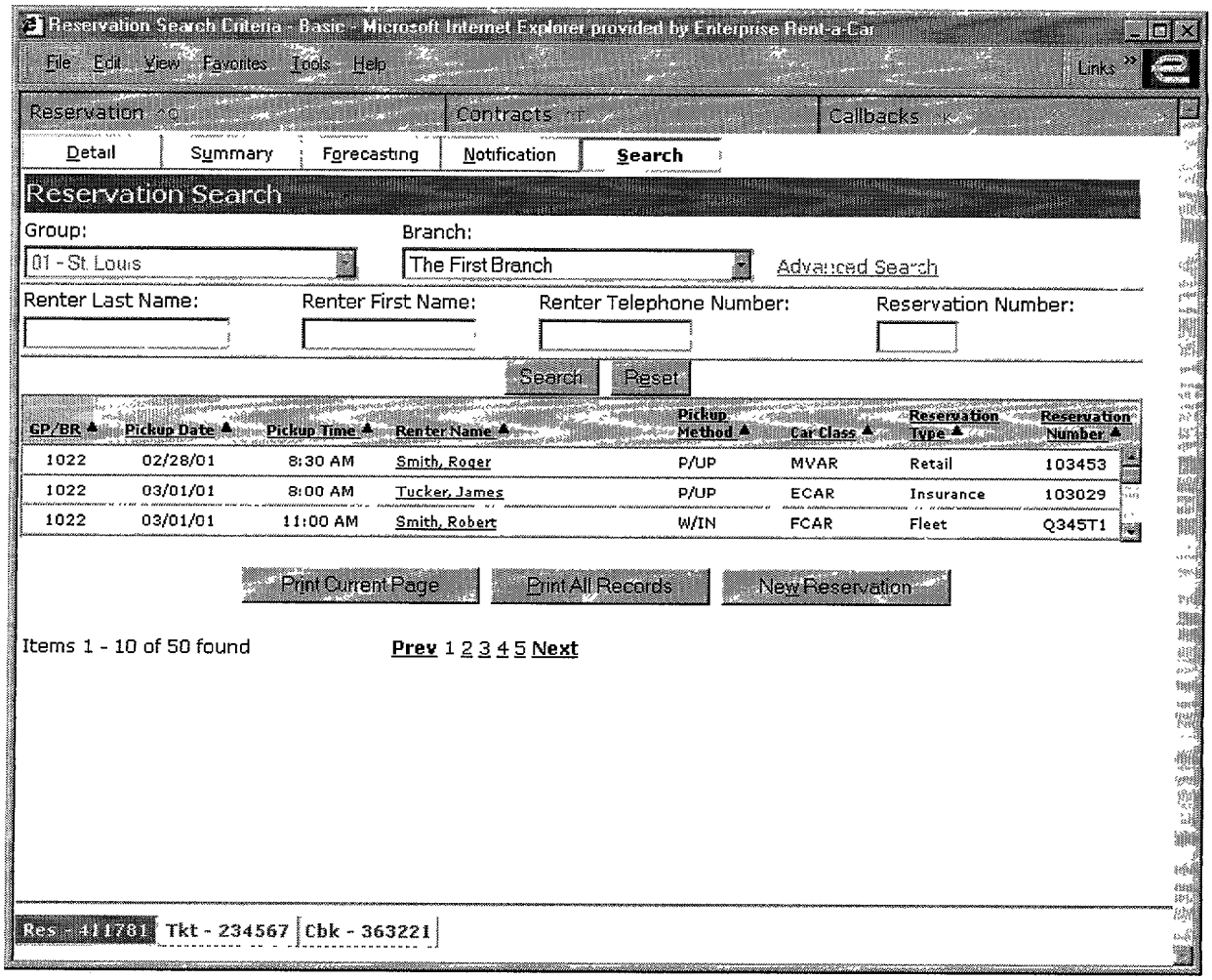

Figure 1.1 – Simple Search – Reservation Pilot version

3. Advanced Search

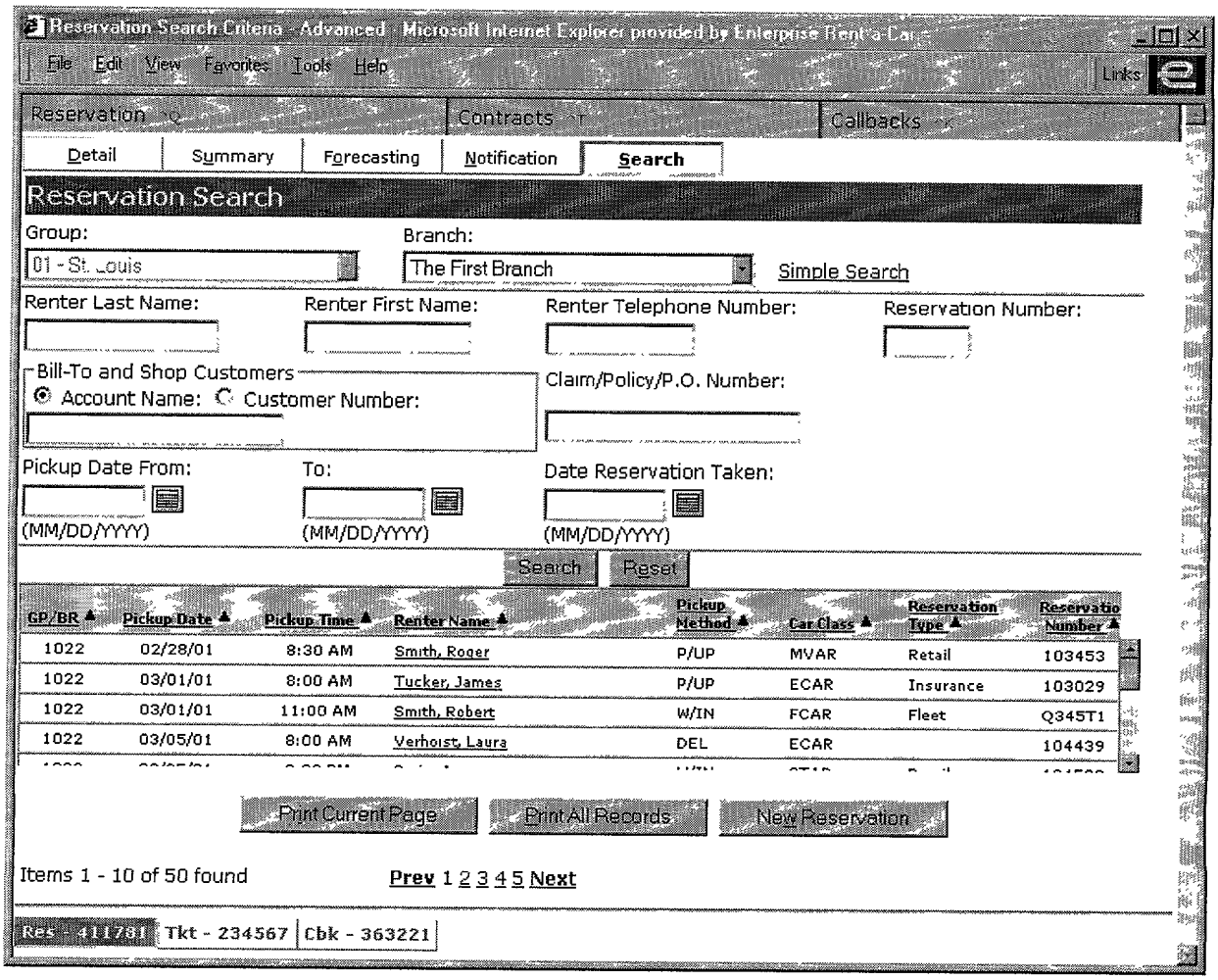

Figure 2 – Advanced Search

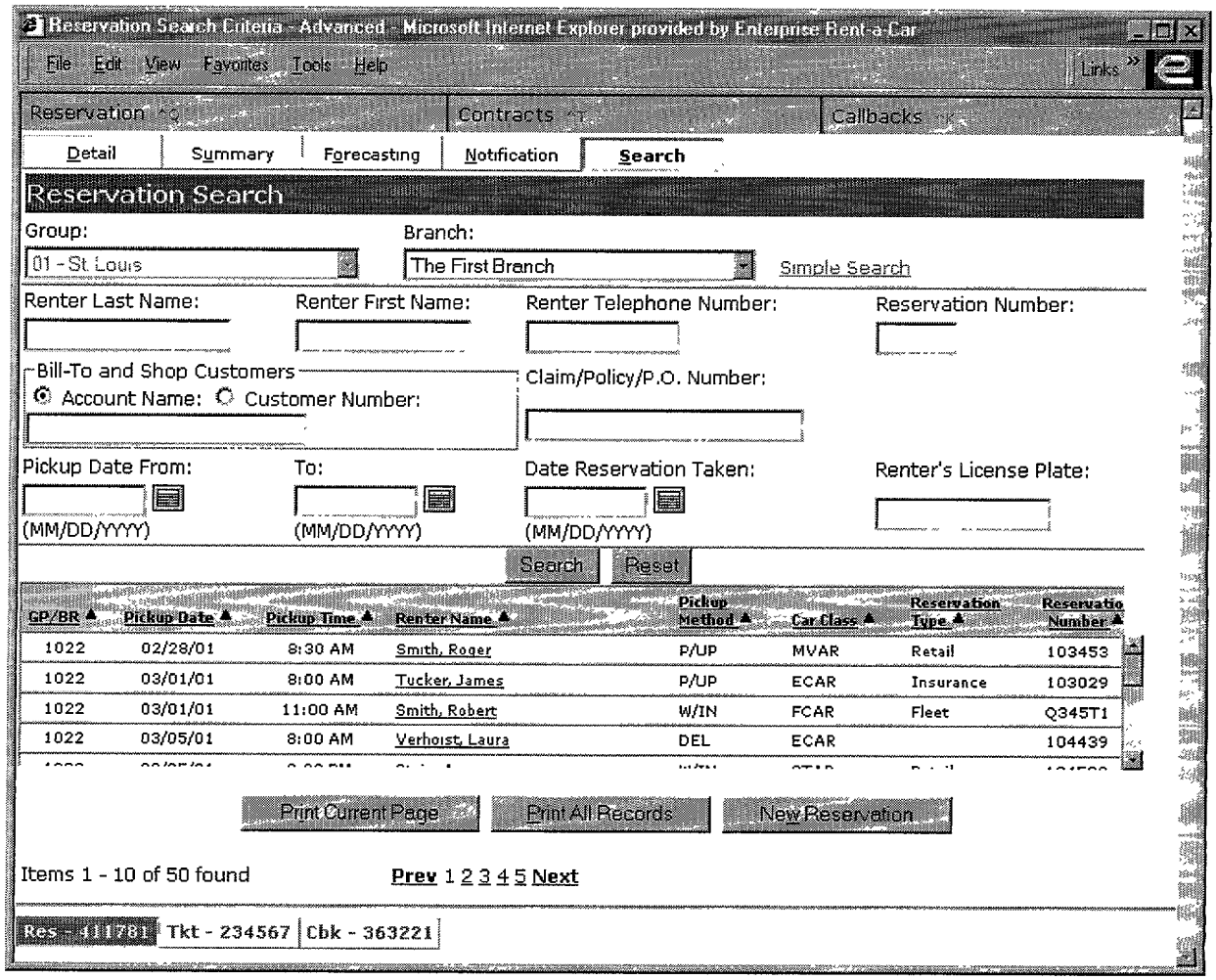

Figure 2.1 – Advanced Search – Reservation Pilot version

Figure 3 - Calendar selection

4. Group

4.1 Behavior

This search criterion will be limited to those groups that exist at any point in time for which the search is being executed. The selection of "All" is also included, and will appear at the top, or first, in the list. This search criteria area will be a drop-down box. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first string beginning with "H" in the list) The default item should be the group associated to the terminal locale.

For Reservation Pilot only, this box will default to the location's group, and cannot be changed.

4.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. This should, in some manner, be initially defaulted to the terminal's group, (based on physical location)

4.3 Business Exceptions

None identified at this time.

4.4 System Exceptions

None identified at this time.

5. Branch

5.1 Behavior

This search criterion will be limited to those branches that exist within the group at any point in time for which the search is being executed. The selection of "All" is also included, and will appear at the top, or first, in the list. This search criteria area will be a drop-down box. The users would also like to have the ability to type a character, alpha or numeric, into the criteria area and have the drop down list position to the character. (If the user enters an "H" the drop down list would position to the first string beginning with "H" in the list)
The default item should be the branch associated to the terminal locale. Branch items appearing in the list will be limited to the Group item selected. Once the selected Group item has changed, the first item (All) will be the default selection item.

5.2 Validation

The items appearing in the list are static; the user cannot add items to the list dynamically. This should, in some manner, be initially defaulted to the terminal's branch, (based on physical location).
This list will be limited to the branches associated with the group selected.

5.3 Business Exceptions

None identified at this time.

5.4 System Exceptions

None identified at this time.

6. Renter Name Last / First

6.1 Behavior

This search criteria area will be a text field containing an implied wildcard after the entered criteria. The First Name field will not be enabled until search criteria has been entered into the Last Name field. Thus, the First Name field will not be accessible via either the tab key or the mouse unless Last Name data is present.
It should be noted that either **Last Name** or **Last Name and First Name** used in combination, is

considered to be just one search criteria.
It will return exact matches for the characters entered and will continue with other text strings that match the characters entered, but are of a longer length (an implied wildcard). Example: If the **Last Name** search criteria entered were "Smith", you would receive back every open ticket with "Smith" in the Last name. You would also receive every character string that matched "Smith" for the first 5 characters, but was longer than five characters. Given this, you would also receive, "Smither", "Smithson", "Smithy", etc. These longer character matches would be alphabetically ascending after the exact character matches of equal length. The **First Name** field behaves in the same manner.

6.2 Validation

Limited to, or constrained by, the Group and Branch indicated or selected.

6.3 Business Exceptions

None identified at this time.

6.4 System Exceptions

None identified at this time.

7. Renter Telephone Number

7.1 Behavior

This search criteria area will be an alphanumeric field. It will not be formatted for presentation purposes. Returns exact matches for the characters entered. A phone number is considered to be the entire number including area code. Example: In the United States, it would be the 3 digit area code, plus the seven digit phone number. (Country Code is not considered a part of the phone number.) The search will be on all phone number fields associated with the Driver/Renter. Currently, these are Home, Office and Other. If the same phone number is found in multiple areas for the same reservation, the reservation will only be displayed once.

7.2 Validation

Limited to, or constrained by, the Group and Branch indicated or selected.

7.3 Business Exceptions

None identified at this time.

7.4 System Exceptions

None identified at this time.

8. Reservation Number

8.1 Behavior

This search area will be an alphanumeric field. It will return exact matches for the characters entered. When this search criterion is used, any other entered criteria will be ignored by the system. Alphanumeric values will be accepted into this field.

For Reservation Pilot only, the search will be limited to the location's group. All other search criteria will be ignored.

8.2 Validation

Any entry into this field constitutes a global search of all groups and branches. It will override the default, or selected, group and branch.

8.3 Business Exceptions

None identified at this time.

8.4 System Exceptions

None identified at this time.

9. Account Name

9.1 Behavior

This search criteria area will be a text field with an implied wild card search after the last character. There is a radial button associated with this criteria area. Upon initial entry, the button will default to Account Name.
It will return exact matches for the characters entered and will continue with other text strings that match the characters entered, but are of a longer length.
An entry into this field will search two roles that a customer may be and return all matches. Currently, the roles to which the number search may be applied are "Shop" and "Bill-To".

9.2 Validation

Limited to, or constrained by, the Group and Branch indicated or selected.

9.3 Business Exceptions

The user may not select the Account Name and the Customer Number Radial button. The two are mutually exclusive.

9.4 System Exceptions

The system prohibits selecting both buttons. It must be one or the other.

10. Customer Number

10.1 Behavior

This search criteria area will be an alphanumeric field.
There is a radial button associated with this criteria area. Upon initial entry, the button will default to Account Name. This radial button can be switched to initiate a customer number search when the user selects the Customer number radial button.
It will return exact matches for the characters entered. An entry into this field will search two roles that a customer may be and return all matches. Currently, the roles to which the number search may be applied are "Shop" and "Bill-To".

10.2 Validation

Limited to, or constrained by, the Group and Branch indicated or selected.

10.3 Business Exceptions

The user may not select the Account Name and the Customer Number Radial button. The two are mutually exclusive.

10.4 System Exceptions

The system prohibits selecting both buttons. It must be one or the other.

11. Claim/Policy/P.O./R.O. Number

11.1 Behavior

This search criteria area will be an alphanumeric field. It will return exact matches for the characters entered.

11.2 Validation

Limited to, or constrained by, the Group and Branch indicated or selected.

11.3 Business Exceptions

None identified at this time.

11.4 System Exceptions

None identified at this time.

12. Range of Pick-Up Dates

12.1 Behavior

This search criteria area will be two numeric fields. A "From" and a "To" area are anticipated. Also, associated with each field, there should be some sort of calendar function available which would allow the user to select a date from a calendar icon, or similar feature, instead of entering a value. If the user selects a date from the calendar icons, it will be displayed in the date area formatted appropriately by the locale. (As determined for all locale specific formatting.) All of the From/To conditionals will still apply, if the date(s) are selected from this calendar feature. The range of dates which may be searched (in the future and past) will be dependent on the legacy system and the range of data stored there. It needs to be understood, that legacy system may have different retention rules than the GUI system.

Whether the user enters just a **From** date, or both **From** and **To** date, it is considered a single search criteria.

12.2 Validation

From search criteria area.

Alphanumeric values will be accepted into this area.
It will not be formatted for presentation purposes.
The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match.
It will be the date appropriate to the locale of the branch where the pick-up of the vehicle is expected.

To search criteria area:

Alphanumeric values will be accepted into this area.
It will not be formatted for presentation purposes.
The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match.
This area is not enabled until an entry has been made into the From area.
If there is no entry into the From area the To area remains disabled.
It will be the date appropriate to the locale of the branch where the pick-up of the vehicle is expected.

12.3 Business Exceptions

FROM - None identified at this time.
TO - If the user does not enter a value into the To field, it will default to the same value as the From field. If the user enters a value into the second field, the To field, it must be greater than, or equal to the value in the first field, the From field.

12.4 System Exceptions

FROM - None identified at this time.
TO - The system would provide an error message. See the "error message" supplemental spec for exact text."

13. Date Reservation Taken

13.1 Behavior

This search criteria area will be an alphanumeric field. It will not be formatted for presentation purposes. The user may enter delineating characters, but these will be stripped out before searching the database to find an exact date match.
It will be the date appropriate to the locale of the branch where the reservation was created.

13.2 Validation

It cannot be for a date in the future.

13.3 Business Exceptions

The system would provide an error message. See the "error message" supplemental spec for exact text.

13.4 System Exceptions

None identified at this time.

14. Renter's License Plate

14.1 Behavior

This search criteria area will be an alphanumeric field. It will return exact matches for the characters entered. This field will not appear if the screen is displayed with a US or Canada locale.

14.2 Validation

Limited to, or constrained by, the Group and Branch indicated or selected.

14.3 Business Exceptions

None identified at this time.

14.4 System Exceptions

None identified at this time.

15. Advanced Search / Simple Search hyperlink

15.1 Behavior

By clicking on the Advanced Search hyperlink, the user is presented with the advanced search functionality Alternatively, by clicking on the Simple Search hyperlink, the user is presented with the default search screen. Any search criteria entered when on the default Simple Search screen will be passed to the Advanced Search screen if/when accessed. If the user navigates to the Simple Search screen from the Advanced Search screen, any search criteria shared by both screens will be passed to the Simple Screen. Any search criteria valid only on the Advanced Screen be lost.

15.2 Validation

Must have at least one search criteria entered, not considering Group and Branch.

15.3 Business Exceptions

An error message stating the "A minimum of at least one search criteria must be entered" should be presented to the user.

15.4 System Exceptions

None identified at this time.

16. Results Display Area

16.1 Behavior

The result display will initially be blank on first presentation of the panel and until at least one search is executed and at least one record is found that matches the search criteria.

This display area provides the user with the search result list. The result list will be comprised of 8 static columns. The specific column order is:

1) The group number and branch number will be concatenated to form this column.
2) The pick up date is the next column, formatted by locale.
3) The pick up time is the next column, formatted by locale.
4) The renter's last name and first name will be concatenated to form this column.
5) The pick-up method.
6) The car class.
7) The reservation type.
8) The reservation number.

The display presentation for each type of information will adhere to result list standards.
The default sort order is:

1) Pick-up group and branch, in numeric ascending order.
2) Pick-up date, in chronologically in ascending order.
3) Pick-up time, in chronologically ascending order.
4) Renter last and first name, in alphabetically ascending order of last name.

The users would like to have the ability to sort the columns in both ascending and descending order. This will only sort the information displayed on the panel and not the entire result set. If the user selects to sort the display by a column, the default sort order will be the order of the remaining sorts, if the user chooses to sort on a column that is not included in the default sort order. If the user moves forward or backward within the result list, the sort on re-presentation of the list is the default sort. The user must select to sort on a specific column within the new display if they want a sort order other than the default.

The capability also needs to exist where a user can indicate or select an individual reservation from the result list, and perform a simple task, (a function button, icon, mouse click) which would then open the reservation for editing purposes. Within this display list the user would select the Renter Name from the display list and perform the designated function. This would be contingent upon the user having the appropriate security to edit the reservation selected. This functionality will be consistent and standard throughout the application.

16.2 Validation

The user may not select to edit a reservation that is outside of their security boundaries.

16.3 Business Exceptions

If a user attempts to edit a reservation that is outside of their security boundaries, an error message of "User is not authorized to edit this reservation" should be displayed.

16.4 System Exceptions

None identified at this time.

17. Results Feedback Line Area

17.1 Behavior

This feedback area provides the user with the search result list count as well as list navigation.

Search Result Count

This area will display a count of the records currently being displayed in the result set area, as well as the total number of records returned in the result set area. The system will display the result set in blocks of 20. If the result set is fewer than 20, all the matches will be displayed. For example, if a search is returned that has 17 matches, this area will display "Items 1 - 17 of 17 Found". If the user is navigating through the result set and moves to the next block of 20 records, this area should update which set of records the user is currently viewing. For example, if the user has returned a search with 110 records, the system will initially display "Items 1 – 20 of 110 Found". If the user navigates to the next block, the system should display "Items 21 – 40 of 110 Found".

List Navigation Area

The user may select the block of records available as returned by the invoked search criteria. These blocks are identified by sequential numbers, along with a First (1st block of records) and Last (last block of records). Also appearing will the Previous and Next. When negotiating through the result list the sequential numbers will change depending upon the block of records being viewed, other blocks of records can be accessed via the Previous and Next hyperlinks. The Previous and Next, and appropriate blocks, should be enabled or disabled according to the positioning of the list. For example, if the list were displaying the first set of several sets of records, the Previous function would be disabled. Similarly, if the list were displaying the last set of records the Next function would be disabled.

This area will display the total number of records found for each search.

17.2 Validation

None identified at this time.

17.3 Business Exceptions

None identified at this time.

17.4 System Exceptions

Buttons and navigation areas would be enabled and disabled appropriately for position of result list display.

18. Button Line Area

18.1 Behavior

The Search image/button will invoke the search process, submitting the form to the server.

The Reset image/button will clear all of the search criteria areas on the panel, but not reset the group or branch or remove the result set, if one is displayed. It will also not affect the results display area.

The Print Current Page and Print All Records images/button are just placeholders. Their functionality and scope are outside of this use case and behavioral document.

The New Reservation button will create a new reservation, changing the screen to that transaction.

18.2 Validation

None identified at this time.

18.3 Business Exceptions

If A Reservation Number is entered, all other search criteria are ignored, including group and branch.

18.4 System Exceptions

At least one-search criteria must be entered, other than group and branch. If not, an error message stating

"At lest one search criteria must be entered."

19. Rules

The Renter Name Last / First and Account Name search criteria have an implied wild card character placed directly after the entered text, all other search criteria fields on this screen are to be treated as exact matches with searching.

There is a minimum of one-search criteria on which a search may be executed. This does not include the Group and Branch selections.

When there are not any matches to the input search criteria the user should be presented with a feedback message stating "Items 0 – 0 of 0 Found".

If the search returns more reservations than can be displayed on the screen at one time, then the system needs to present to the user the range of records they are viewing out of the total number of records.

All of the above search criteria, EXCEPT Reservation Number, will be limited to, or constrained by, the Group and Branch indicated or selected.

20. Security

The user must have the appropriate security level to access this screen. The user is allowed to view or print anything. It is when they attempt to edit a reservation that their security restrictions will be enforced.

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